

CAREER & TECHNOLOGY STUDIES

ENTERPRISE & INNOVATION

GUIDE TO STANDARDS AND IMPLEMENTATION

INTERIM 1992
(SEPTEMBER 1992 – SEPTEMBER 1997)
INCLUDES 1996 UPDATES

HB
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E56
1996
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CURRGDHT

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EDUCATION

CURRICULUM STANDARDS BRANCH



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This document was prepared for:

<i>Administrators</i>	✓
<i>Counsellors</i>	✓
<i>General Audience</i>	
<i>Parents</i>	
<i>Students</i>	
<i>Teachers</i>	✓



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Program/Level: Career and Technology Studies/Secondary

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Every effort has been made to acknowledge original sources and comply with copyright regulations. Please notify Alberta Education if there are cases where this has not been done. Shaded areas within this document have been approved for optional implementation. Assessment conditions and criteria are in draft form and will be validated 1994-97.

SUMMARY OF CHANGES

This June 1996 version of the *Guide to Standards and Implementation* differs from the June 1995 version as follows:

Section A	No change
Section B	Updated Scope & Sequence
Section C	Minor edits to Planning for Instruction
Sections D, E, F	All conditions and criteria have been revised to include references to assessment tools and standards <i>with some modifications to specific learner expectations</i>
Section G	Assessment tools have been revised and expanded
Section H	Information on linkages and transitions have been updated and reorganized
Section I	Resource lists have been updated to include new resource approvals
Section J	Sample student learner guides have minor revisions, particularly to "HOW will your mark be determined?" and "WHICH resources may you use?"
Section K	Acknowledgments are not included in this version

In May 1997, the Guides to Standards and Implementation will be revised again in preparation for provincial implementation in September 1997.

Questions or comments about this Guide to Standards and Implementation are welcome and should be directed to:

Career and Technology Studies Unit, Curriculum Standards Branch, Alberta Education,
Devonian Building West, 11160 Jasper Avenue, Edmonton, Alberta, T5K 0L2.
Telephone: (403) 422-4872, Fax: (403) 422-0576

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CAREER AND TECHNOLOGY STUDIES

PROGRAM PHILOSOPHY/RATIONALE

Through Career and Technology Studies (CTS), secondary education in Alberta is responding to the many challenges of modern society, helping young people develop daily living skills, and nurturing a flexible, well-qualified work force.

In Canada's information society, characterized by rapid change in the social and economic environment, students must be confident in their ability to respond to change and successfully meet the challenges they face in their own personal and work lives. In particular, they must make decisions about what they will do when they finish high school. Many students will enter the work force, others will continue their education. All students face the challenges of growing independence and responsibility, and of entering the highly competitive workplace and/or post-secondary programs.

Secondary schools also face challenges. They must deliver, on a consistent basis, high quality, cost-effective programs that students, parents and community find credible and relevant.

CTS helps schools and students meet these challenges. Schools can respond more efficiently and effectively to student and community needs and expectations by using the opportunities in the CTS curriculum to design courses and access school, community and distance learning resources. Students can develop the confidence they need as they move into adult roles by assuming increased

responsibility for their learning; cultivating their individual talents, interests and abilities; and defining and acting on their goals.

As an important component of basic education in Alberta secondary schools, CTS promotes students' achievement by setting clear expectations and recognizing students' success. Students in CTS develop competencies—that is, the knowledge, skills and attitudes students must demonstrate, or what they know and can do.

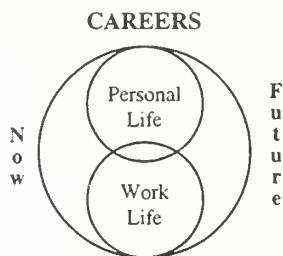
These competencies can be applied now and in the future as students make a smooth transition into adult roles in the family, community, workplace and/or further education. To help ensure this transition for students, clearly stated expectations and standards have been defined with the assistance of teachers, business and industry representatives and post-secondary educators.

CTS offers *all* students important learning opportunities. Regardless of the particular area of study chosen, students in CTS will:

- develop skills that they can apply in their daily lives now and in the future
- refine career-planning skills
- develop technology-related skills
- enhance employability skills
- apply and reinforce learnings developed in other subject areas.

In CTS, students build skills they can apply in their everyday lives. For example, in the CTS program, particularly at the introductory levels, students have the opportunity to improve their ability to make sound consumer decisions, and to appreciate environmental and safety precautions.

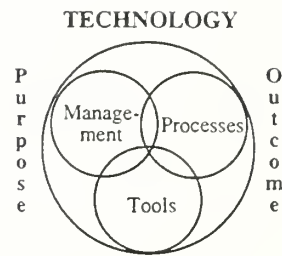
A career encompasses more than activities related to a person's job or occupation; it involves one's personal life in both local and global contexts; e.g., as a family member, a friend, a community volunteer, a citizen.



The integration of careers throughout the CTS program helps students make effective career decisions and target their efforts. Students in CTS will have the opportunity to expand their knowledge about careers, occupations and job opportunities and the education and/or training requirements involved. As well, they will recognize the need for lifelong learning.

Students in CTS will have the opportunity to use and apply technology and systems effectively and efficiently, which involves:

- a decision regarding which processes and procedures best suit the task at hand
- the appropriate selection and skilled use of the tools or resources that are available
- an assessment of and management of the impact the use of the technology may have on themselves, on others and on the environment.



Integrated throughout CTS are employability skills, those basic competencies that help students develop their personal management and social skills. Personal management skills are improved as students take increased responsibility for their learning, design innovative solutions to problems or challenges, and manage resources effectively and efficiently. Students' social skills improve through learning experiences that require them to work effectively with others, demonstrate teamwork and leadership, and maintain high standards in safety and accountability.

Further enhancing the employability skills, CTS reinforces and enhances learnings developed in core and other complementary courses. The curriculum emphasizes, as appropriate, the effective application of communication and numeracy skills.

Finally, in addition to the common outcomes described above, those students who focus on a particular area of study will develop career-specific competencies that support entry into the workplace and/or related post-secondary programs. Career-specific competencies can involve understanding and applying appropriate terminology, processes and technologies related to a specific career, occupation or job.

GENERAL LEARNER EXPECTATIONS

General learner expectations describe the basic competencies that are integrated throughout the CTS program.

Within an applied context that is relevant to personal goals, aptitudes and abilities, the student in Career and Technology Studies will:

- demonstrate the basic knowledge, skills and attitudes necessary for achievement and fulfillment in personal life
- develop an action plan that relates personal interests, abilities and aptitudes to career opportunities and requirements
- use technology effectively, linking and applying available tools, management and processes to produce a desired outcome
- develop personal management skills by:
 - linking theory and practice, using resources, tools, technology and processes responsibly and efficiently (managing learning)
 - applying effective and innovative decision-making and problem-solving strategies in the design, production, marketing and consumption of goods and services (being innovative)
 - selecting relevant, goal-related activities, ranking them in order of importance, allocating necessary time, and preparing and following schedules (managing resources)
- improve social interaction skills by:
 - demonstrating flexibility and cooperative work and communication behaviors (working with others)
 - participating as a team member by working cooperatively with others and contributing to the group with ideas, suggestions and effort (teamwork and leadership)
 - demonstrating high standards of diligence, attendance and punctuality, following safe procedures consistently, and recognizing and eliminating potential hazards (demonstrating responsibility)
- demonstrate appropriate verbal, written, composition, summarization and presentation skills
- use basic computation and measurement principles accurately and efficiently.

PROGRAM ORGANIZATION

CURRICULUM STRUCTURE

Career and Technology Studies is organized into *strands* and *modules*.

Strands in CTS define competencies that help students:

- build daily living skills
- investigate career options
- use technology (managing, processes, tools) effectively and efficiently
- prepare for entry into the workplace and/or related post-secondary programs.

In general, strands relate to selected industry sectors that offer positive occupational opportunities for students. Some occupational opportunities require further education after high school, and some allow direct entry into the workplace. The industry sectors encompass both goods-producing industries, such as agriculture, manufacturing and construction, and service-producing industries, such as business services, health services, and finance and insurance services.

Modules are the building blocks for each strand. They define what a student is expected to know and be able to do (exit-level *competencies*). Modules also specify prerequisites and facility and instructional parameters, where necessary.

The competencies a student must demonstrate to achieve success in a module are defined through the *module learner expectations*. Senior high school students who can demonstrate the module learner expectations (i.e., have the designated competencies) will qualify for one credit towards their high school diploma.

Module learner expectations are a culmination of the *specific learner expectations*, which provide a more detailed framework for instruction. They define the scope and depth of knowledge, skills and attitudes the student should acquire.

The following chart shows the 22 strands that comprise the CTS program and the number of modules available in each strand.

Strand	No. of Modules
1. Agriculture	31
2. Career Transitions	23
3. Communication Technology	32
4. Community Health	31
5. Construction Technologies	46
6. Cosmetology	58
7. Design Studies	31
8. Electro-Technologies	37
9. Energy and Mines	27
10. Enterprise and Innovation	8
11. Fabrication Studies	41
12. Fashion Studies	29
13. Financial Management	15
14. Foods	37
15. Forestry	21
16. Information Processing	43
17. Legal Studies	13
18. Logistics	12
19. Management and Marketing	21
20. Mechanics	53
21. Tourism Studies	24
22. Wildlife	17

Note: As of September 1996, all 22 strands are available for optional implementation in Alberta junior and high schools. Provincial implementation of all strands is scheduled for September 1997.

LEVELS OF ACHIEVEMENT

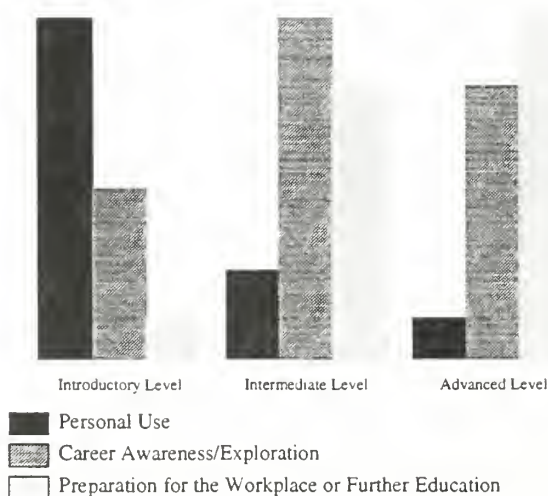
Modules are organized into three levels of achievement: introductory, intermediate and advanced. As students progress through the levels, they will be expected to meet higher standards and demonstrate increased degree of competence, both in the general learner expectations and the module learner expectations.

Introductory level modules help students build daily living skills and form the basis for further learning. Introductory modules are developed for students who have no previous experience in the strand.

Intermediate level modules build on the competencies developed at the introductory level. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.

Advanced level modules demand a higher level of expertise and help prepare students for entry into the workplace or a related post-secondary program.

The following illustrates the relative emphasis on the aspects of career planning at each of the levels.

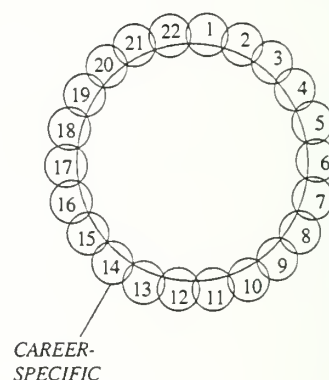


TYPES OF COMPETENCE

Two types of competence are defined within the CTS program: basic and career-specific.

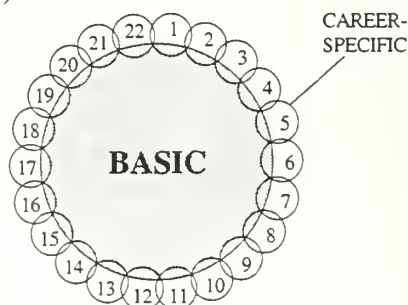
Basic Competencies are generic to any career area and are developed within each module. Basic competencies include:

- personal management; e.g., managing learning, being innovative, ethics, managing resources
- social; e.g., communication, teamwork, leadership and service, and demonstrating responsibility (safety and accountability).



Career-specific Competencies relate to a particular strand. These competencies build daily living skills at the introductory levels and support the smooth transition to the workplace and/or post-secondary programs at the intermediate and advanced levels.

The following model shows the relationship of these two types of competencies within the 22 strands of CTS (numbers refer to the chart on page A.5):



CURRICULUM AND ASSESSMENT STANDARDS

CURRICULUM STANDARDS

Curriculum standards in CTS define what students must know and be able to do. Curriculum standards are expressed through general learner expectations for CTS, and through module and specific learner expectations for each strand.

ASSESSMENT STANDARDS

Assessment standards define how the student's performance will be judged. In CTS, each assessment standard defines the conditions and criteria to be used for assessing the competencies defined in each module learner expectation. Students must fully meet each assessment standard, including all of the criteria and conditions defined for the module. Assessment standards are in draft form, as are tools and weightings, and will be validated 1994–97.

Teachers throughout the province will be able to ensure students receive a fair and reliable assessment. Students will use the assessment standards to guide their efforts, ensuring they participate more effectively and successfully in the learning and assessment process. Standards at advanced levels are as much as possible linked to workplace and post-secondary entry-level requirements.

The following pages describe the Enterprise and Innovation strand in the Career and Technology Studies program.

ENTERPRISE AND INNOVATION

STRAND RATIONALE

Enterprising individuals are agents of change. They make things happen. They recognize opportunities for improvement in goods, services and processes and undertake to mobilize resources to meet challenges, to innovate. They develop new ways of responding to the many changes and challenges we face in an increasingly competitive and interrelated world.

Schools can play a key role in helping students become more enterprising and innovative. Enterprise and Innovation is designed to challenge high school students of all ability levels to expand their confidence, experience and skills as innovators and leaders, encouraging them to recognize how these competencies can help them succeed in any career, whether as a volunteer, an employer or an employee.

One such career area, entrepreneurship, depends particularly on the ability to be enterprising and innovative. **Entrepreneurship** involves the recognition of opportunities (needs, wants and problems) and the use of resources to implement innovative ideas for new, thoughtfully planned ventures. **Intrapreneurship** is entrepreneurship occurring within an existing organization.

Throughout Enterprise and Innovation, entrepreneurship will be used frequently as the context for learning, helping students develop expertise at:

- identifying opportunities
- monitoring and revising plans as necessary
- marshalling resources
- developing sensitivity to the needs and wants of client groups
- developing and implementing plans
- building teamwork and leadership skills.

Within a secure and supportive environment, students will have opportunities to develop and implement venture plans, either simulated or in real terms. These venture plans could be community-, public service- or profit-related. Through these ventures, students will develop numeracy, communication, decision-making and social skills. Students will be encouraged to link the competencies they have developed through past experiences, hobbies and interests with and between those of core and complementary courses.

Ventures can take many forms. For example, students might:

- establish a business venture
- establish a volunteer, community or service program
- plan, market and manage an event or a conference
- produce, market and distribute a book or video.

These venture plans link technical, managerial, enterprise and innovation competencies. At the same time, opportunities to understand career options better can help students invest their energies more effectively in those occupational areas they prefer and in which they have the aptitude to succeed. The program helps students understand basic economic principles and business processes. In addition, they develop an increased awareness and appreciation of the roles of small business, entrepreneurship and self-employment in society.

High school students make crucial career decisions as they move toward independence and adult responsibilities. In view of the frequent career changes that students can expect to experience throughout their work life, they need to develop competencies that can be transferred readily. They need to be able to recognize opportunity and to develop confidence in their ability to act on that opportunity. This process involves identifying and assessing their strengths, aptitudes and interests as they prepare to leave high school, continue in post-secondary programs, or move directly into the workplace.

Within the philosophy of Career and Technology Studies, students in Enterprise and Innovation *will*:

- identify and enhance personal motivation, self-concept and the knowledge, skills and attitudes that foster enterprise and innovation in all kinds of endeavours, such as business ventures, community ventures, non-profit ventures. Skills included are:
 - creative thinking
 - goal setting
 - communicating
 - researching/organizing
 - decision making/problem solving
 - team building
 - managing
 - planning
- develop greater awareness of the role of business, entrepreneurship and intrapreneurship in our society and the global economy
- translate change and challenge into a viable opportunity by identifying options, resources and sources of support.

Learner expectations defined in Enterprise and Innovation comprise the competencies to help students become:

- more comfortable with change and innovation
- more entrepreneurial or intrapreneurial in any career, whether as a volunteer, an employer or an employee
- more accepting of both success and failure as learning opportunities
- more sophisticated consumers of business services
- more aware of public and private sector development initiatives and investments.

STRAND ORGANIZATION

THEMES

Themes provide the guiding focus for individual modules. This CTS strand has three themes.

Getting the Idea

Students learn to recognize opportunities and generate ideas to meet society's needs in creative, new and innovative ways.

Preparing for Action

Students are challenged to formalize their venture planning skills by examining the elements of planning and the various methods of identifying, assessing and minimizing risk. Using this knowledge, they will select, plan and assess a specific venture. Students will have the opportunity to analyze and assess the financing alternatives and feasibility of various ventures.

Making It Happen

Students have a venture plan, which they will put into action. They will "Make It Happen". Students will apply management and marketing strategies to their venture and, if appropriate, may also expand it.

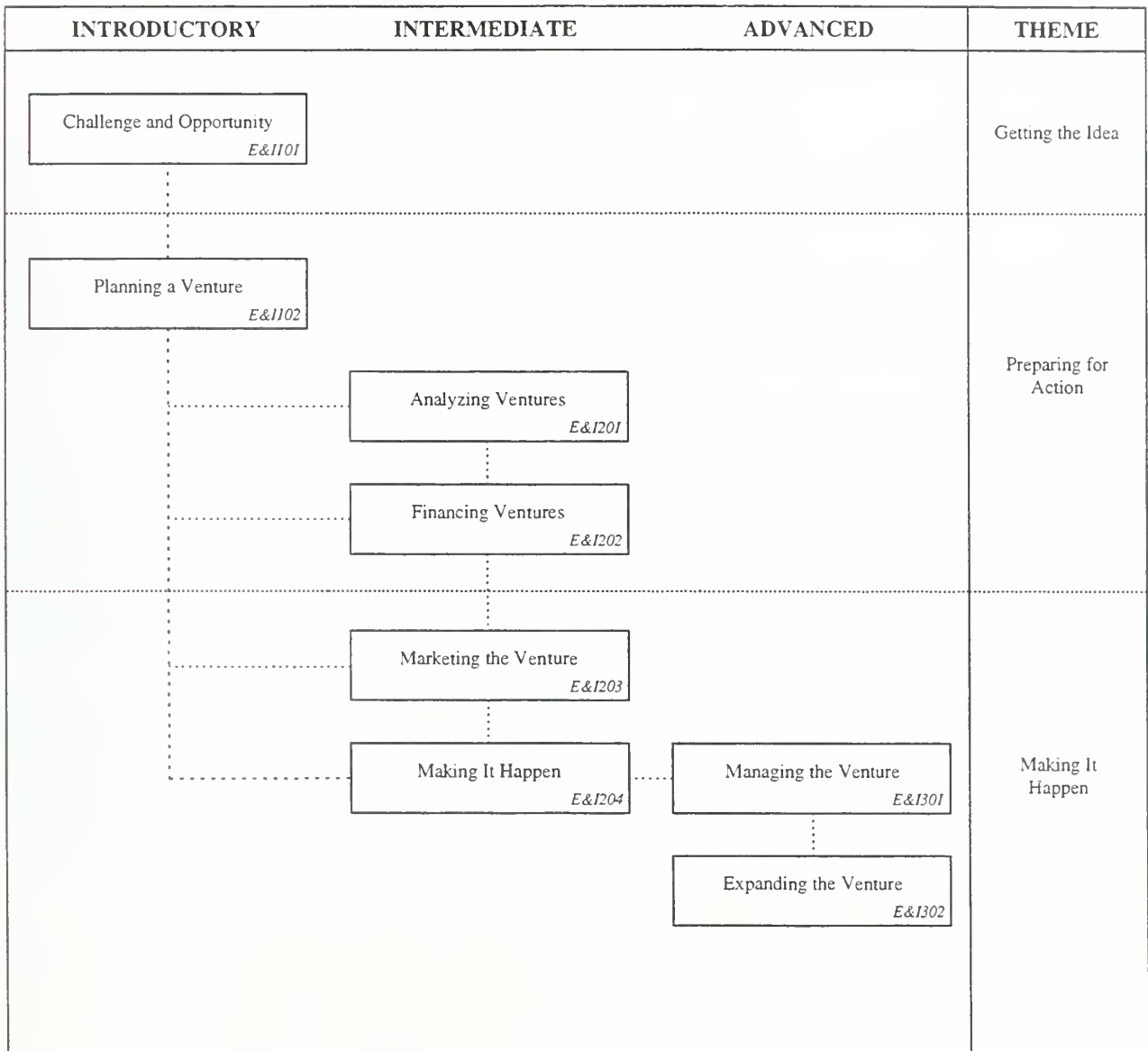
CONCEPTS

Certain concepts important in the Enterprise and Innovation strand are integrated throughout the modules. Emphasis varies according to the module content and context. These concepts are:

- **Planning/Organizing:** Students are challenged to formalize their venture-planning skills, apply personal goal-setting and problem-solving strategies, secure resources and develop methods to meet human resources needs, financial needs and the marketing, production and service requirements to implement a venture. Students apply the theories of planning and management to their venture
- **Analyzing/Assessing:** Students learn to develop criteria for assessment of venture alternatives and to analyze the feasibility of the venture at various stages of planning and implementation
- **Management:** The management process of decision making, problem solving and analyzing is an integral part of all Enterprise and Innovation modules
- **Considering Career Options:** Career exploration is integrated throughout the Enterprise and Innovation strand. Through the process of creating and implementing a venture, students develop skills in creative thinking, goal setting, communicating, research/organizing, decision making, problem solving, team building, managing and planning. These competencies help students become more entrepreneurial or intrapreneurial in any career, whether as a volunteer, an employer or an employee.
- **Recognizing Opportunity:** Students learn to recognize opportunity, whether it is a problem to solve, a societal trend to address, or a way to improve a product, process or service
- **Getting Ideas:** Students develop skills in creative thinking and teamwork by generating ideas and alternatives that address a need or opportunity or solve a problem

SCOPE AND SEQUENCE

ENTERPRISE AND INNOVATION



—— Prerequisite Recommended sequence

MODULE DESCRIPTIONS

Module E&I101: Challenge and Opportunity

The student identifies, compares and assesses a variety of venture opportunities and ideas, and investigates career paths and possibilities where enterprise and innovation are particularly important.

Module E&I102: Planning a Venture

The student has the opportunity to learn and apply the “venture-planning process” while planning a venture.

Module E&I201: Analyzing Ventures

The student gathers and analyzes data to make informed decisions on the feasibility of ventures.

Module E&I202: Financing Ventures

The student examines various sources of financing and chooses the method that is best for financing the venture.

Module E&I203: Marketing the Venture

The student appraises various marketing strategies and formulates a marketing strategy for a venture.

Module E&I204: Making It Happen

The student implements and assesses a venture.

Module E&I301: Managing the Venture

The student develops management procedures for a venture.

Module E&I302: Expanding the Venture

The student explores and assesses the elements of success in expanding a venture.

SECTION C: PLANNING FOR INSTRUCTION

CTS provides increased opportunity for junior and senior high schools to design courses based on the needs and interests of their students and the circumstances within the school and community. Some strands may be appropriately introduced at the junior high school level. Other strands are more appropriately introduced at the senior high school level or to Grade 9 students. Refer to this section for recommendations regarding the Enterprise and Innovation strand, or the *CTS Manual for Administrators, Counsellors and Teachers* for a summary of the recommended grade levels for each strand.

PLANNING FOR CTS

Defining Courses

Schools determine which strands and modules will be offered in a particular school, and will combine modules into courses.

Each module was designed for approximately 25 hours of instruction. However, this time frame is only a guideline to facilitate planning. The CTS curricula are competency based, and the student may take more or less time to gain the designated competencies within each module.

A course will usually consist of modules primarily from the same strand but, where appropriate, may include modules from two or more strands. Refer to the *CTS Manual for Administrators, Counsellors and Teachers* for more information on course names and course codes.

Module selection and sequencing must consider the module parameters, which define:

- prerequisite and corequisites (entry-level competencies)
- instructional qualifications, if specialized
- equipment and facility requirements, if specialized.

The module parameters are defined for each module in Sections D, E and F of this Guide

Degree of Flexibility

The CTS program, while designed using the modular structure to facilitate flexible timetabling and instructional delivery, does not mandate the degree of flexibility a school or teacher will offer. The teacher and school will determine the degree of flexibility available to the student. Within the instructional plan established by the school, the student may:

- be given the opportunity to progress at a rate that is personally challenging
- have increased opportunity to select modules that develop competencies he or she finds most relevant.

Integrating Basic Competencies

Basic competencies are also developed throughout the CTS program and within each module. Selected basic competencies will be emphasized within a module, depending on the nature of the career-specific competencies defined for the module.

Refer to Section G (Assessment Tools) of this Guide for the description of student behaviours expected at each of the four developmental stages defined for the basic competencies.

Assessment of basic competencies could include input and reflection involving the student, teacher(s), peers and others. Description of the observed behaviour could be provided through a competency profile for the module. Positive, ongoing interaction between the student and teacher will support motivation for student growth and improvement.

Assessment of student achievement on the basic competencies is integrated throughout the other module learner expectations.

Assessing Student Achievement

Assessing the student's competency is a process of gathering information by way of observations of process, product and student interaction.

Where appropriate, assessment tools have been defined to assist the teacher and student in the assessment. Refer to Section G (Assessment Tools) of this Guide to Standards and Implementation for copies of the various tools (worksheets, checklists, sample questions, etc.).

A suggested emphasis for each module learner expectation has also been established. The suggested emphasis provides a guideline to help teachers determine a time allocation and/or a percentage grade for students.

Recognizing Student Achievement

At the high school level, successful demonstration of the exit-level competencies in a module qualifies the student for one credit. Refer to Section A of this Guide for more detailed information about how curriculum and assessment standards are defined in CTS. Refer to the *CTS Manual for Administrators, Counsellors and Teachers* for more information on how student achievement can be recognized and reported at the school and provincial levels.

Resources

A comprehensive resource base, including print, software and audio-visual, has been identified to support the Enterprise and Innovation strand. It is intended that these resources will form the basis of a resource centre, encouraging teachers and students to access a wide selection of resources and other information sources throughout the learning process. Unless otherwise noted, these resources are considered to be suitable for both junior and senior high school students.

Authorized resources may be obtained from the Learning Resources Distributing Centre or directly from the publisher or distributor. Refer to Section I (Learning Resources Guide) for the complete resource list including curriculum correlations and resource annotations. Additional sources refer to non-commercial or government agencies that offer resources that may be of assistance in this strand.

In addition to the resources, sample Student Learning Guides are available for some modules in Enterprise and Innovation in Section J. These samples, designed for individual student or small group use, provide an instructional plan for selected modules and include the following components:

- Why take this module?
- What are the entry-level competencies?
- What are the exit-level competencies?
- What resources may be accessed?
- What assignments/activities must be completed?
- What are the time lines?
- How will the final mark be calculated?

PLANNING FOR ENTERPRISE AND INNOVATION

The following suggestions are provided to assist teachers and school and school system administrators as they plan to deliver modules from the Enterprise and Innovation strand.

Selecting Modules

The scope and sequence chart in Section B, provides an overview of the Enterprise and Innovation modules, indicating prerequisites and theme areas. Brief descriptions of the modules follow the scope and sequence chart in Section B.

Enterprise and Innovation does not require specialized facilities or equipment, but will benefit from interaction and partnership with community members as well as access to up-to-date information sources.

Courses may be designed using only Enterprise and Innovation modules or by combining Enterprise and Innovation with other Career and Technology Studies strands. During the optional implementation period, 1992–96, modules from business education may also be used in combination with Enterprise and Innovation modules to form courses.

Enterprise and Innovation in Junior High

The following three modules may be offered at the junior high level:

- Challenge and Opportunity (Introductory Level)
- Planning the Venture (Introductory Level)
- Making It Happen (Intermediate Level).

Junior high students may not complete all the learner expectations in all three modules. However, it would be beneficial to structure a junior high Enterprise and Innovation course so students would be able to plan and implement a venture. At the junior high level, it is advisable to select short-term ventures that are reasonably easy to implement with substantial teacher direction.

Enterprise and Innovation in Senior High

All introductory, intermediate and advanced modules may be offered to senior high students. However, some students may have some of the competencies identified through their involvement in:

- junior high Enterprise and Innovation
- school/community associations; e.g., Peer Support, Student Government, Junior Achievement
- a family business
- an enterprising initiative of their own; e.g., lawn maintenance, snow removal, baby-sitting, house sitting, pet care.

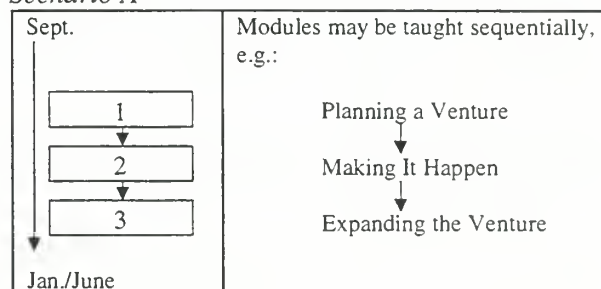
Organizing for Learning

Before selecting modules, teachers should check the module parameters outlined in each module (see Sections D, E and F of the Guide). These module parameters describe:

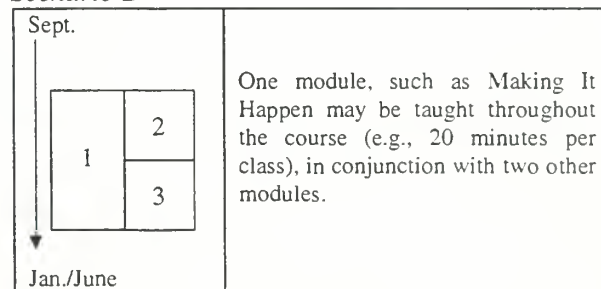
- prerequisite or corequisite modules,
- facility and equipment requirements, if required, and
- instructional qualifications, if required.

Modules can be delivered sequentially, concurrently or combined. For example:

Scenario A

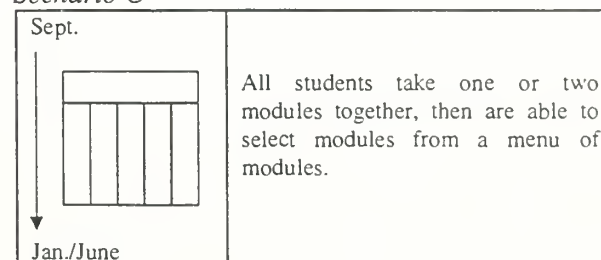


Scenario B

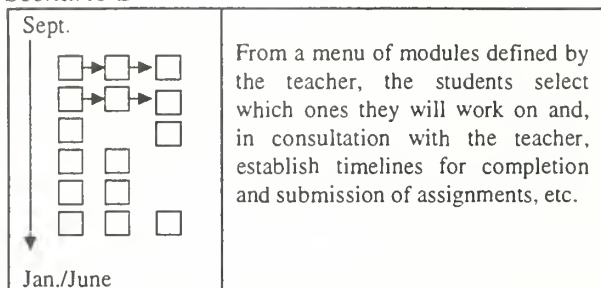


Teachers can also allow students to progress at a rate that is personally challenging; e.g.:

Scenario C



Scenario D



Identifying Linkages

Section H of this Guide describes linkages within CTS and with core and complementary programs.

Note that project modules from the Career Transitions strand may be combined with modules from Enterprise and Innovation to provide increased opportunity for students to develop expertise and refine their competencies.

Improving Smooth Transitions to the Workplace and/or Post-secondary Programs

Refer to Section H of this Guide for potential transitions students may make into the workplace and/or related post-secondary programs or other avenues for further learning.

MODULE CURRICULUM AND ASSESSMENT STANDARDS:

SECTION D: INTRODUCTORY LEVEL

The following pages define the curriculum and assessment standards for the introductory level of Enterprise and Innovation.

Introductory level modules help students build daily living skills and form the basis for further learning. Introductory modules are developed for students who have no previous experience in the strand.

Module learner expectations define the competencies a student must demonstrate to achieve success in a module. Assessment standards define the conditions and criteria to be used for assessing the competencies defined in the module learner expectations. These assessment standards and the accompanying assessment tools are in draft form and will be validated from 1994 to 1996.

Specific learner expectations provide a detailed framework for instruction to help students build the competencies defined in the module learner expectations. Additional information and suggestions for instruction are provided in the Notes column; teachers may wish to use this space to record their ideas for instruction or student projects.

Module E&I101:	Challenge and Opportunity	D.3
Module E&I102:	Planning A Venture	D.7

MODULE E&I101: CHALLENGE AND OPPORTUNITY

Level: Introductory

Theme: Getting the Idea

Prerequisite: None

Module Parameters: No specialized facilities or equipment required

The student identifies, compares and assesses a variety of venture opportunities and ideas, and investigates career paths and possibilities where enterprise and innovation are particularly important.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> • apply strategies and develop competencies in: – identifying opportunities – creating and generating ideas – establishing needs, wants and priorities – assessing alternatives – assessing environmental impact • investigating career options where enterprise and innovation are particularly important	<i>Assessment of student achievement will be based on:</i> • logbook record consisting of entries as outlined in the “Framework for Logbook Record”. The focus is on creativity; therefore, there are no right or wrong answers. <i>Assessment Tool</i> <i>Logbook Record Checklist, E&I101-1</i> <i>Group Member Effectiveness Observation Form, E&IGRP</i> <i>Interview Guidelines, E&IITV</i> <i>Standard</i> <i>All applicable sections have been completed</i>	60

MODULE E&I101: CHALLENGE AND OPPORTUNITY (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> identify, compare and assess a variety of venture opportunities	<i>Assessment of student achievement will be based on:</i> a report analyzing four entrepreneurial ventures making a judgement, with justification, on which venture has the most potential. <i>Assessment Tool</i> <i>Framework for Assessing Entrepreneurial Ventures, E&I101-2</i> <i>Standard</i> <i>A minimum performance rating of 1 in each applicable area of assessment</i>	30
describe the process and components of a venture plan	concept test of questions on the means of entering a business, components of a venture plan, business regulations and social responsibilities. <i>Assessment Tool</i> <i>Module 101: Sample Concept Test, E&I101-3</i> <i>Standard</i> <i>Correctly answer a minimum of 50% of questions</i>	10
demonstrate basic competencies.	observations of individual effort and interpersonal interaction during the learning process: - managing learning - being innovative - acting ethically - teamwork and leadership. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

Concept	Specific Learner Expectations	Notes
Recognizing and Assessing Opportunity	<i>The student should:</i> - compile a list of opportunities (needs, wants and problems) - develop and apply a decision-making model for potential entrepreneurial opportunities - expand repertoire of thinking skills: - problem solving - decision making.	

MODULE E&I101: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Notes
Generating Ideas	<i>The student should:</i> • develop skills in generating ideas, alternatives and strategies • assess personal preferences in thinking strategies • outline conditions needed to promote idea generation and change initiation • discuss “failure” as an opportunity to learn • be sensitive to and respectful of the perspectives, needs, wants and priorities of others • demonstrate characteristics of creative thinking.	
Planning a Venture	• compare various means of entering business: – start a new business – purchase a business – purchase a franchise – multilevel marketing • identify non-profit ventures • describe the process of creating a venture plan: – rationale – goals/objectives – research – resources – market analysis – risk assessment – financial analysis – success strategy • describe the important components of a venture plan: – description/objectives – market research and analysis – marketing plan – production/service plan – financial plan – human resources/organizational plan	

MODULE E&I101: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Notes
Planning a Venture (continued)	<i>The student should:</i> • discuss regulations and social responsibilities that limit venture alternatives: – legal – social – ethical – environmental – cultural – political – economical.	
Assessing a Venture	• consider criteria for assessing the feasibility of ideas and strategies • analyze the components of a successful marketing strategy • apply feasibility criteria to venture alternatives • prepare a feasibility analysis of a venture idea: – brief description – objectives – resources required to achieve objectives – time line.	
Considering Career Options	• outline personal characteristics and skills of enterprising individuals and organizations • outline the meaning, role and responsibility of entrepreneurs and intrapreneurs in society, and how they initiate change • develop a personal profile to assess own entrepreneurial/intrapreneurial potential • analyze the factors that lead to career decisions and opportunities/risks • assess career paths to which enterprise and innovation are particularly important • compare lifestyles of entrepreneurs and intrapreneurs with personal career choices • relate personal goals to goal setting and career options as an entrepreneur or intrapreneur.	

MODULE E&I102: PLANNING A VENTURE

Level: Introductory

Theme: Preparing for Action

Prerequisite: Challenge and Opportunity

Module Parameters: No specialized facilities or equipment required

The student has the opportunity to learn and apply the “venture-planning process” while planning a venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> • apply personal goal-setting and problem-solving strategies that facilitate change effectively • assess potential risks and propose strategies for assessing risks • develop strategies for securing resources and support to implement a venture • select, plan and assess a venture	<i>Assessment of student achievement will be based on:</i> • a venture plan report consisting of research, technical and content components as outlined in the “Framework for Assessing a Venture Plan”. <i>Assessment Tool</i> <i>Framework for Assessing a Venture Plan, E&I102-1</i> <i>Standard</i> <i>A minimum performance rating of 1 in each applicable area of assessment</i>	70

MODULE E&I102: PLANNING A VENTURE (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> - demonstrate qualities that initiate change: - initiative - flexibility - leadership/team member - consider career options	<i>Assessment of student achievement will be based on:</i> - a presentation consisting of a description of the student's personal contribution to the venture plan in terms of initiative, flexibility, leadership and team member. <i>Assessment Tool</i> <i>Venture Plan Contribution, E&I102-2</i> <i>Standard</i> <i>A minimum performance rating of 1 in each applicable area</i> <i>OR</i> logbook record consisting of entries as outlined in the Logbook Record Checklist. <i>Assessment Tool</i> <i>Logbook Record Checklist, E&I102-3</i> <i>Interview Guidelines, E&IITV</i> <i>Standard</i> <i>A minimum performance rating of 1 in each applicable area</i>	30
demonstrate basic competencies.	observations of individual effort and interpersonal interaction during the learning process: - managing learning - being innovative - managing resources - communication - teamwork and leadership - demonstrating responsibility. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I102: PLANNING A VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Organizing for Success	<i>The student should:</i> • formulate short- and long-term goals for the selected venture • relate personal philosophy with venture goals • develop a mission statement for the venture • formalize operational policies consistent with the venture philosophy and business ethics • monitor and adjust the philosophy to meet the needs of the venture • outline a human resources plan • establish a support network: – locate and design potential support networks – propose strategies for securing and effectively using sources of support.	
Analyzing Markets	• analyze potential markets: – local – regional – national – international/global • relate market projections to trends and forecasts • assess potential competition • outline venture needs regarding: – target market – product/service – pricing – location • examine and appraise potential changes in the market.	
Assessing and Minimizing Risk	• examine the types of potential risks: – physical – financial – human resources • propose strategies to assess and minimize risk • complete a risk assessment.	

MODULE E&I102: PLANNING A VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Completing a Venture Plan	<i>The student should:</i> - complete a venture plan: - purpose - description/objectives - market research and analysis - marketing plan - production/service plan - financial plan - human resources/organizational plan - analyze the venture plan and revise as necessary.	
Presenting the Venture Plan	- explore various presentation techniques - present the venture plan - analyze and assess the outcome of the presentation.	
Assessing the Venture	- assess criteria used by other individuals and groups for a successful venture - assess the strengths and weaknesses of the venture - prepare a written critique assessing the venture.	
Considering Career Options	- examine own leadership style - evaluate own leadership style and its appropriateness for the success of the venture.	

MODULE CURRICULUM AND ASSESSMENT STANDARDS:

SECTION E: INTERMEDIATE LEVEL

The following pages define the curriculum and assessment standards for the intermediate level of Enterprise and Innovation.

Intermediate level modules help students build on the competencies developed at the introductory level and focus on developing more complex competencies. They provide a broader perspective, helping students recognize the wide range of related career opportunities available within the strand.

Module E&I201:	Analyzing Ventures	E.3
Module E&I202:	Financing Ventures	E.7
Module E&I203:	Marketing the Venture	E.11
Module E&I204:	Making It Happen	E.15

MODULE E&I201: ANALYZING VENTURES

Level: Intermediate

Theme: Preparing for Action

Prerequisites: Planning a Venture

Module Parameters: No specialized equipment or facilities required

The student gathers and analyzes data to make informed decisions on the feasibility of ventures.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> - describe and apply various methodologies for analyzing and evaluating ventures: - market analysis - industry analysis - financial analysis - product/service evaluation	<i>Assessment of student achievement will be based on:</i> research project consisting of: - data collected using primary and secondary method of research - analysis of this data using the following methodologies: - market analysis - industry analysis - financial analysis - human resources analysis - product/service evaluation. <i>Assessment Tool</i> <i>Framework for Assessing a Market Survey</i> <i>E&I201-1</i> <i>Standard</i> <i>A minimum performance rating of 2 in each applicable area of assessment</i>	70
analyze research, compare a variety of ventures and make informed decisions about the feasibility of each venture	comparison: within a class period, and accessing Case Studies, the student will compare two ventures according a minimum of five of the following criteria: - human resources - production - managing - marketing - distribution - technical feasibility - general acceptance - competition - legalities. <i>Assessment Tool</i> <i>Framework for Comparing Entrepreneurial Ventures, E&I201-2</i> <i>Standard</i> <i>A minimum performance rating of 2 in each applicable area of assessment</i>	30

MODULE E&I201: ANALYZING VENTURES (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> demonstrate basic competencies.	<i>Assessment of student achievement will be based on:</i> observations of individual effort and interpersonal interaction during the learning process: - managing learning - being innovative - acting ethically - teamwork and leadership. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

Concept	Specific Learner Expectations	Notes
Conducting Research	<i>The student should:</i> - describe various methodologies for analyzing and evaluating ventures: - personal criteria - market analysis - industry analysis - financial analysis - human resources analysis - product/service evaluation - examine criteria important to the success of various ventures: - personal criteria - effectiveness of human resources - customer benefits - ability to raise capital - return on investment - growth potential - technical feasibility - simplicity of manufacturing - ease of operation - quality of product/service - marketability - size of market - advertising potential - conduct market research, collecting both primary and secondary data, and indicate the advantages and disadvantages of each	

MODULE E&I201: ANALYZING VENTURES (continued)

Concept	Specific Learner Expectations	Notes
Conducting Research (continued)	<i>The student should:</i> • outline various primary data collection methods: – observation – surveys – questionnaires • identify sources of secondary data: – libraries: • school • public • government – associations: • business • professional – journals: • trade • business • professional – publications: • federal • provincial • municipal.	
Analyzing Data	• analyze and compare ventures in terms of: – personal criteria – human resources – production – managing – marketing – distribution – technical feasibility – general acceptance – competition – legalities • discuss potential risks involved in ventures: – financial – personal – legal – societal – environmental • compare various venture plans in terms of: – market analyses – operating plans – financial plans	

MODULE E&I201: ANALYZING VENTURES (continued)

Concept	Specific Learner Expectations	Notes
Analyzing Data (continued)	<i>The student should:</i> • compare the financial plan/projection of various ventures or case studies through an analysis of such aspects as: – working capital/cash flow – operating expenses – financial ratios – profitability.	
Assessing Ventures	• by using the data presented, assess the strengths and weaknesses of each venture • select the most feasible venture based on the analyzed data • prepare a written critique, including an in-depth analysis and assessment of a venture.	

MODULE E&I202: FINANCING VENTURES

Level: Intermediate

Theme: Preparing for Action

Prerequisites: Planning a Venture

Module Parameters: No specialized equipment or facilities required

The student compares various sources of financing and chooses the method that is best for financing the venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> - analyze the advantages and disadvantages of financial options - examine various sources of financing for ventures	<i>Assessment of student achievement will be based on:</i> - the completion of 2 of the following activities: - read a book or a feature magazine article on a major corporation, family business, or a CEO of a major firm - prepare a collage or bulletin board display which features pamphlets appropriate for business ventures collected from various financial institutions - arrange a guest speaker and/or field trip related to one of the following: a) determining franchise operations b) bank personnel discussing the advantages and disadvantages of one or both of: - equity financing - debt financing - debate financing options. <i>Assessment Tools</i> <i>Framework for Assessing Financing Options, E&I202-1</i> <i>Standard</i> <i>For each option, a minimum of four of the five activities have been completed</i>	40
distinguish between short- and long-term financing	Chart: Using a spreadsheet program or amortization tables, create a chart for each of three given scenarios to show the amount of interest paid over various lengths of time and with different interest rates on a set amount of money <i>Assessment Tool</i> <i>Framework for Assessing Amortization Charts, E&I202-2</i> <i>Standard</i> <i>For each scenario, a minimum of four of the five activities have been completed</i>	10

MODULE E&I202: FINANCING VENTURES (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> demonstrate the process of applying for different types of financing	<i>Assessment of student achievement will be based on:</i> application forms completed for two different financial institutions; e.g., bank, credit union, trust company, government organization <i>Assessment Tool</i> <i>Framework for Assessing Application for Financing Forms, E&I202-3</i> <i>Standard</i> <i>All applicable sections have been completed meeting the criteria as outlined in framework</i>	10
demonstrate basic competencies.	a financial plan prepared and presented for either personal finances or business ventures <i>Assessment Tool</i> <i>Framework for Assessing a Financial Plan, E&I202-4</i> <i>Standard</i> <i>For selected option, a minimum of four of the activities are completed</i>	40
	observations of individual effort and interpersonal interaction during the learning process: – being innovative – communication – teamwork and leadership – demonstrating responsibility. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I202: FINANCING VENTURES (continued)

Concept	Specific Learner Expectations	Notes
Financing Terminology	<i>The student should:</i> • explain equity capital • explain debt financing • categorize given examples of equity capital and debt financing • become familiar with a glossary of terms relevant to financing ventures.	
Equity Capital	• examine various sources of equity capital: – personal capital: • self • family • friends – venture capital: • venture capitalists • business “angels” – partnerships – shares – stocks/bonds • debate characteristics of sources of equity capital within the local community.	
Debt Financing	• examine various sources of debt financing: – personal savings – family/friends – financial institutions: • banks • credit unions • trust companies • government organizations – loan sharks – debentures – mortgages • debate characteristics of sources of debt financing within the local community • locate, compile and complete loan applications with local financial institutions	

MODULE E&I202: FINANCING VENTURES (continued)

Concept	Specific Learner Expectations	Notes
Debt Financing (continued)	<i>The student should:</i> • discuss other sources of financing and assistance: – suppliers – memberships – fund raising – sales – societies – foundations – government.	
Cash Flow	• examine financial needs at various stages of ventures • distinguish between fixed and variable costs • formulate and explain a “break even analysis” for ventures • distinguish between short- and long-term financing • differentiate between cash flow, and profit and loss statement • prepare a sample cash flow.	
Making a Choice	• research and evaluate various financial options in terms of: – advantages/disadvantages – inherent risks – costs – stress – relationships – decision-making power • consult with appropriate specialists: – accountants – lawyers – insurance brokers – bankers – consultants • select the financial alternatives that best meet the needs of the venture • prepare and present a financial plan for the venture • analyze and assess the outcome.	

MODULE E&I203: MARKETING THE VENTURE

Level: Intermediate

Theme: Making It Happen

Prerequisites: Planning a Venture

Module Parameters: No specialized equipment or facilities required

The student appraises various marketing strategies and formulates a marketing strategy for a venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> analyze various marketing strategies for their applicability in terms of marketing mix for a target market	<i>Assessment of student achievement will be based on:</i> - a comparison of marketing strategies used by two businesses in the same industry to reach their target market based on: - target market - product - price - place - promotion. <i>Assessment Tool</i> <i>Framework for Assessing the Marketing Strategies of Entrepreneurial Ventures, E&I203-1</i> <i>Standard</i> <i>A minimum performance rating of 2 in each applicable area of assessment</i>	20
- formulate and implement a marketing strategy for a particular venture - appraise the strengths and weaknesses of the marketing strategy, and revise as necessary	a marketing plan outlining the specific strategies to be employed for his or her venture. <i>Assessment Tool</i> <i>Framework for Assessing a Venture Marketing Plan, E&I203-2</i> <i>Standard</i> <i>A minimum performance rating of 2 in each applicable area of assessment</i>	80
demonstrate basic competencies.	observations of individual effort and interpersonal interaction during the learning process: - being innovative - communication - teamwork and leadership. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I203: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Marketing Objectives	<i>The student should:</i> • apply the concept of marketing to a particular venture • analyze the relationship between marketing and other venture decisions • examine the decisions that must be made when completing a marketing plan • research sources of assistance and information, and create a support network.	
Targeting the Market	• differentiate between primary and secondary data • conduct basic marketing research from the following sources in order to identify the primary target customer: – secondary sources: • trade magazines • news articles • the <i>Yellow Pages</i> • Statistics Canada – primary sources: • observing • interviewing potential customers • identify and describe a typical customer in terms of: – psychographics: • lifestyle • buying habits • attitudes • opinions – demographics: • education levels • income • age – geographics: • geographic area • use statistical information to identify the number of potential customers within the marketing area	

MODULE E&I203: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Targeting the Market (continued)	<i>The student should:</i> - analyze a particular venture in terms of the marketing mix: - product service characteristics; i.e., unique selling points - pricing - distribution channels - promotion.	
Marketing Strategies	- identify and analyze various marketing strategies for their applicability in terms of marketing mix for a target market - justify the importance of a marketing program for the venture: - economic - social - business - compare the various techniques of promotion: - advertising - personal selling - free publicity - sales promotion - merchandising - trade shows - analyze cost/benefit factors in the selection of alternative marketing strategies - formulate and implement a promotional strategy, within a predetermined budget, for a particular venture.	
Analyzing Marketing Strategies	appraise the strengths and weaknesses of the marketing strategy, and revise as necessary.	

MODULE E&I204: MAKING IT HAPPEN**Level: Intermediate****Theme: Making It Happen****Prerequisites: Planning a Venture****Module Parameters: No specialized equipment or facilities required**

The student implements and assesses a venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> - implement a venture - establish management procedures required to start the venture	<i>Assessment of student achievement will be based on:</i> Logbook Record that includes the following: – implementation time lines – implementation procedures for: • managing • marketing • financing • human resource requirements • producing/servicing requirements. <i>Assessment Tool</i> <i>Logbook Record Checklist: Making It Happen, E&I204–1</i> <i>Standard</i> <i>All applicable sections have been completed</i>	20
demonstrate leadership qualities in implementing the venture	Reflection Record consisting of an examination of his or her personal leadership style and its appropriateness for the venture. <i>Assessment Tools</i> <i>Reflection Record: Leadership, E&I204–2</i> <i>Standard</i> <i>Supportive evidence is provided for a minimum of five of the nine criteria as outlined</i>	10
manage problem solving and decision making at each implementation stage of the venture	a written critique and/or oral presentation that describe the problem-solving and decision-making process during the venture planning and implementation stages. <i>Assessment Tool</i> <i>Problem Solving Assessment for a Venture Plan, E&I204–3</i> <i>Standard</i> <i>A minimum performance rating of 2 in each applicable area of assessment</i>	60

MODULE E&I204: MAKING IT HAPPEN (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> • assess the venture	<i>Assessment of student achievement will be based on:</i> • a set of criteria developed by the student to assess the success (as personally defined) of the venture <i>Assessment Tool</i> <i>Criteria Development in Venture Assessment, E&I204–4</i> <i>Standard</i> <i>The venture assessment includes a minimum of five criteria and supporting evidence</i>	10
• demonstrate basic competencies.	• observations of individual effort and interpersonal interaction during the learning process: – managing learning – being innovative – acting ethically – managing resources – communication – teamwork and leadership – demonstrating responsibility. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I204: MAKING IT HAPPEN (continued)

Concept	Specific Learner Expectations	Notes
Starting the Venture	<i>The student should:</i> - determine the start-up requirements for the venture - examine legal obligations that affect the venture - analyze the common forms of business ownership: - sole proprietorship - partnership - corporation - cooperative.	
Managing the Venture	- discuss the functions of management - analyze why businesses fail, and illustrate the consequences of poor and/or inadequate planning - examine short- and long-range plans for the venture - examine management models and leadership styles.	
Marketing the Venture	- formulate a market plan considering: - sales and distribution - advertising - pricing.	
Financing the Venture	- examine the need for and limitations of a budget and its implications in the financial plan of the venture: - income - expenditures: - production - labour - distribution - marketing - design a strategy for measuring, monitoring and controlling results against the plans - prepare a cash flow projection.	

MODULE E&I204: MAKING IT HAPPEN (continued)

Concept	Specific Learner Expectations	Notes
Human Resources Requirements	<i>The student should:</i> - ascertain human resources needs and how these are to be met - identify career ladders for personnel.	
Producing/Serviceing Requirements of the Venture	- describe the product or service in terms of: - characteristics: - quality - excellence - labour: - availability - efficiency - effectiveness - suppliers - equipment/technology - property and facilities - cost data.	
Assessing the Venture	- compare and contrast various ways of assessing ventures - develop a set of criteria to assess the venture - examine personal/individual motives in relation to the development and creation of the venture - relate leadership strategies to venture analysis - assess the lifestyle implications of the venture - analyze the venture in terms of change and trends projected for the future - prepare a written critique of the venture.	

MODULE CURRICULUM AND ASSESSMENT STANDARDS:

SECTION F: ADVANCED LEVEL

The following pages define the curriculum and assessment standards for the advanced level of Enterprise and Innovation.

Advanced level modules demand a higher level of expertise and help prepare students for entry into the workplace or a related post-secondary program.

Module E&I301: Managing the Venture.....	F.3
Module E&I302: Expanding the Venture.....	F.9

MODULE E&I301: MANAGING THE VENTURE

Level: Advanced

Theme: Making It Happen

Prerequisites: Making It Happen

Module Parameters: No specialized equipment or facilities required

The student develops management procedures for a venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> - manage the venture by performing the following functions: - planning - organizing - managing human resources - managing finances - monitoring - establish management procedures necessary to implement the venture - examine critical risks, and develop contingency procedures	<i>Assessment of student achievement will be based on:</i> - an Organizational Chart outlining the structure of one of the following: - their own venture - another organization <i>Assessment Tool</i> <i>Framework for Assessing Organizational Chart, E&I301-1</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment.</i> - a Contingency Plan: Given three problem scenarios, the student will develop a contingency plan for each example: - drop-in demand for product - human resource complication - major delay in production - a new competition in the market. <i>Assessment Tool</i> <i>Framework for Assessing Contingency Plans, E&I301-2</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment</i>	30 45

MODULE E&I301: MANAGING THE VENTURE (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> monitor the venture plan, and revise as necessary	<i>Assessment of student achievement will be based on:</i> - an Oral Presentation on the status of the venture addressing the following: - current position, highlighting the strengths, weaknesses and revisions necessary. <i>Assessment Tool</i> <i>Framework for Assessing Venture Progress, E&I301-3</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment</i> Reflection Record consisting of identification of personally significant knowledge, skills and attitudes within the context of management. <i>Assessment Tool</i> <i>Framework for Assessing a Reflection Record, E&I301-4</i> <i>Standard</i> <i>A minimum of five of nine criteria must be completed with supportive evidence as outlined</i>	20 5
demonstrate basic competencies.	- observations of individual effort and interpersonal interaction during the learning process: - managing learning - being innovative - acting ethically - managing resources - communication - teamwork and leadership - demonstrating responsibility. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I301: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Planning	<i>The student should:</i> • evaluate the objectives and goals of the venture • examine management functions: – leading – motivating – morale building – planning – directing – problem solving – decision making – communicating – organizing – monitoring • analyze the goals, and develop a plan of action to fulfill venture requirements in terms of: – capital – labour – marketing – production/service • examine the need for accounting procedures, and review source documents, such as: – sales receipts – cash register records – cheque stubs • appraise government regulations dealing with: – health – safety – compensation • discuss ethical and unethical business practices • examine the marketing mix: – product/service – pricing – location – promotion • formulate a plan to monitor: – inventory – supplies.	

MODULE E&I301: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Organizing	<i>The student should:</i> • describe qualities of leadership as a management tool • compare the effects of leadership styles on human relations • develop an organizational structure to achieve the goals and objectives of the venture • analyze the organizational structure in terms of: – flexibility – suitability to type and size of venture – communication channels – decision-making process – efficiency • establish and maintain effective internal/external communication functions.	
Managing Human Resources	• describe the necessary components/strategies of: – recruitment – human resources development • examine characteristics for a supervisor role • discuss the components of remuneration: – tangible – intangible • assess impact of working conditions on organizational culture • explain impact of morale on productivity • apply the use of an organization plan prepared by others • demonstrate conflict resolution strategies • demonstrate negotiating skills • propose a system to deal with tardiness and absenteeism • formulate a plan to encourage: – team building – professionalism.	

MODULE E&I301: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Managing Finances	<i>The student should:</i> • examine accounting functions: – cash flow – profit and loss – balance sheet • perform banking functions: – identify banking institutions – properly complete various forms • design a sample payroll • examine the function of accounts receivable and accounts payable in relation to cash flow.	
Monitoring	• examine various venture plans and identify factors in the venture plan that require monitoring: – cash flow – customer/client satisfaction – human resources effectiveness – other • set a time line indicating when and how often each factor would be monitored • propose adjustments to remedy inconsistencies • examine external factors that may affect the venture: – fluctuating economy – fads – seasonal variations • propose adjustments to remedy inconsistencies • develop strategies for changing a plan in progress • compare and assess financial alternatives • discuss circumstances when it may be appropriate to downsize or terminate the venture • formulate a plan addressing the requirements and responsibilities involved in downsizing or terminating a venture.	

MODULE E&I302: EXPANDING THE VENTURE

Level: Advanced

Theme: Making It Happen

Prerequisites: Managing the Venture

Module Parameters: No specialized facilities or equipment required

The student explores and assesses the elements of success in expanding a venture.

Curriculum and Assessment Standards

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> • analyze the rationale for expanding a particular venture • evaluate the options available, and develop expansion strategy • compare personal philosophy with venture goals	<i>Assessment of student achievement will be based on:</i> • a written synopsis and/or oral presentation that includes: – the rationale for expansion taking into consideration • personal criteria: - values - goals - expertise • economic criteria • financial considerations • social/ethical considerations • personal definition of a “successful” venture – an analysis of options available which could include: • managing, financing, promotion strategies • vertical or horizontal expansion • diversification – the rationale for selection one of the above options: • taking into consideration personal philosophy • a plan for implementation. <i>Assessment Tool</i> <i>Framework for Assessing Expansion of the Venture, E&I302-1</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment</i>	40

MODULE E&I302: EXPANDING THE VENTURE (continued)

Module Learner Expectations	Assessment Criteria and Conditions (Draft)	Suggested Emphasis
<i>The student will:</i> implement the expansion of a particular venture	<i>Assessment of student achievement will be based on:</i> Expansion Plan: Alone or as a group, students will implement the expansion plan. <i>Assessment Tools</i> <i>Framework for Assessing Implementation of Expansion Plan, E&I302-2</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment</i>	30
assess the elements of “success” (as personally defined) of the expanded venture	- a written and/or oral assessment of expanded venture which includes: - a personal definition of “success” - identification of expansion goals - a set of criteria developed by the students to assess their expansion “success” (as personally defined). <i>Assessment Tool</i> <i>Framework for Success of Venture Expansion, E&I302-3</i> <i>Standard</i> <i>A minimum performance rating of 3 in each applicable area of assessment</i>	30
demonstrate basic competencies.	- observations of individual effort and interpersonal interaction during the learning process: - being innovative - acting ethically - teamwork and leadership - demonstrating responsibility. <i>Assessment Tool</i> <i>Basic Competencies Reference Guide and any assessment tools noted above</i>	Integrated throughout

MODULE E&I302: EXPANDING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Analyzing Expansion Potential	<i>The student should:</i> - analyze the rationale for expanding a particular venture, taking into consideration: - personal criteria: - values - goals - expertise - economic criteria - financial considerations - social/ethical considerations - personal definition of a “successful” venture - compare personal philosophy with venture goals - evaluate the options available for expansion: - vertical or horizontal expansion - diversification.	
Making the Decision	- recognize and appraise the conditions that indicate the possibility for expansion - predict the impact of expansion on the roles within the venture - formulate realistic goal expectations for expansion - propose possible directions for expansion.	
Developing the Expansion	- examine the limitations resulting from the type of venture involved - design a plan for implementing the expansion - formulate a strategy to achieve the expansion: - managing - financing - promotion - implement the expansion of a particular venture.	

MODULE E&I302: EXPANDING THE VENTURE (continued)

Concept	Specific Learner Expectations	Notes
Monitoring and Assessing the Expansion	<i>The student should:</i> • investigate the social consequences • analyze the degree of success in achieving the financial goals • assess the elements of “success” (as personally defined) of the expanded venture • predict the need for future/continued expansion.	
Franchising	• examine the concept of franchising as a means of expanding business • evaluate the benefits and risks • examine the process of establishing franchises.	

ENTERPRISE AND INNOVATION

SECTION G: ASSESSMENT TOOLS

(DRAFT)

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The following pages include background information and strategies for assessing student achievement and the assessment tools that are listed in Sections D, E and F of this Guide.

This section of the Guide to Standards and Implementation has been designed to provide a common base of understanding about the level of competencies students are expected to demonstrate to successfully complete a module. The goal is to establish assessment standards for junior and senior high school students that are fair, credible, and challenging.

These tools will assist teachers throughout the province to more consistently assess student achievement. The purpose of expanding on the assessment standards is to:

- increase confidence among students, parents, business/industry and post-secondary that students can demonstrate the competencies specified in the modules they have completed
- encourage fairness and equity in how students' efforts are judged
- enable learners to focus effort on key learnings
- support teachers and community partners in planning and implementing CTS.

These tools are in draft form and are being validated between now and 1997 during the optional stage of CTS implementation.

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ASSESSING STUDENT ACHIEVEMENT IN CTS

The CTS assessment standards assess two basic forms of competency:

- What a student **can do**?
 - **make** a product (e.g., wood bowl, report, garment)
 - **demonstrate** a process
 - strand-related competencies (e.g., keyboarding, hair cutting, sewing techniques, lab procedures)
 - basic competencies (e.g., resource use, safety procedures, teamwork).
- What a student **knows**?
 - knowledge base needed to demonstrate a competency (link theory and practice).

CTS Defines *Summative* Assessment Standards

The assessment standards and tools defined for the CTS modules, referenced in Sections D, E and F of this Guide, focus on the final (or summative) assessment of student achievement.

Assessment throughout the learning period (or formative assessment) will continue to assess how students are progressing. Teachers direct and respond to students' efforts to learn—setting and marking tasks and assignments, indicating where improvement is needed, sending out interim reports, congratulating excellence, etc.

Teachers will decide which instructional and assessment strategies to apply during the formative learning period. As formative and summative assessment are closely linked, some teachers may wish to modify the tools included in this section to use during the instructional process. Teachers may also develop their own summative assessment tools as long as the standards are consistent with the minimum expectations outlined by Alberta Education.

Grading and Reporting Student Achievement

When a student can demonstrate ALL of the exit-level competencies defined for the module (Module Learner Expectations), the teacher will designate the module as “successfully completed.” The teacher will then use accepted grading practices to determine the percentage grade to be given for the module—a mark not less than 50%.

The time frame a teacher allows a student to develop the exit-level competency is a local decision. NOTE: The Senior High School Handbook specifies that students must have access to 25 hours of instruction for each credit. Students may, however, attain the required competencies in less time and may proceed to other modules.

Teachers are encouraged to consult their colleagues to ensure grading practices are as consistent as possible.

High school teachers may wish to refer to “Directions for Reporting Student Achievement in CTS” for information on how to use the CTS course codes to report credits students have earned to Alberta Education. (Copies of this document have been forwarded to superintendents and senior high school principals.)

Components of Assessment Standards in CTS

The following components are included in each module:

- **module learner expectations** (shaded left column of the module) define the exit-level competencies students are expected to achieve to complete a module. Each MLE defines and describes critical behaviours that can be measured and observed. The student must meet the standard specified for **ALL** MLEs within a module to be successful. (*MLEs will not change until 1997 when minor adjustments may be made to update and clarify wording.*)

- **suggested emphasis** (right column of the module) provides a guideline for the relative significance of each MLE and can be used to organize for instruction. (*In draft until early 1997, revisions to selected modules will be distributed in June 1995 and 1996 with final revisions in June 1997.*)
- **conditions and criteria** (middle column of the module) set the framework for the assessment of student competency, specifying the minimum standard for performance and including a reference to assessment tools, where appropriate. (*In draft until early 1997, revisions to selected modules will be distributed in June 1995 and 1996 with final revisions in June 1997.*)

Conditions outline the specifications under which a student's competency can be judged. For example, the conditions could specify whether the assessment should be timed or not, or if the student should be allowed to access to support resources or references.

Criteria define the behaviours that a student must demonstrate to meet the designated standard. For example, the criteria could describe the various techniques that must be demonstrated when using a tool, and/or describe the minimum components of a project the student must complete.

Standard may be defined by (1) assessment tools, which are referenced in this section (or sometimes in approved learning resources) and/or (2) "illustrative examples" of student work (to be developed and distributed in June 1997).

Assessment Tools included in this section of the Guide tend to be of two types:

- tools generic to a strand or to the entire CTS program; e.g., a standard 5-point rating scale is used in all strands. Other generic tools include assessing reports and presentations and lab safety checklists. (*Names of these tools include the strand*

code (e.g., "INF" for Information Processing) and a code for the type of tool (e.g., "TDENT" for Text-Data Entry).)

- tools specific to a module; e.g., assessment checklist for assessing a venture plan in Enterprise and Innovation or a checklist for sketching, drawing and modelling in Design Studies. (*Names of these tools include the module code; e.g., "INF101-1" indicating that it is the first module-specific tool used in Information Processing Module 101.*)
- Illustrative Examples: Selected examples of student work in print, audio, video and/or CD-ROM formats are scheduled to be available by June 1997. These examples will supplement the assessment tools and help teachers decide if a student's work is at standard, above standard, or not yet at standard.

Development and Validation Processes

The "Conditions and Criteria" and "Suggested Emphasis" columns are being validated 1994–97, with extensive input from teachers, professional associations/contacts and post-secondary institutions. The goal is to prepare well-structured assessment standards and related assessment tools that:

- establish an appropriate level of challenge and rigour
- relate directly to the type of learning described in the curriculum standard
- are easy to understand
- are efficient to implement
- can provide a consistent measure of what was expected to be measured.

ASSESSING STUDENT ACHIEVEMENT IN ENTERPRISE AND INNOVATION

The Enterprise and Innovation curriculum is based on the premise that recognizable outcomes may be compared to stated standards. In Enterprise and Innovation, the standards identify students' growth in knowledge, skills and attitudes. The curriculum defines outcomes through the Module Learner Expectations (MLEs) and Specific Learner Expectations (SLEs). It also suggests criteria and conditions for assessment and the emphasis to be placed on each expectation. These elements combine to provide an overall framework for instruction and assessment.

Assessment Strategies and Tools

A variety of tools have been provided for your reference and use. In the development of the assessment materials there has been an attempt to keep it as simple as possible while also providing guidance and assistance to teachers. The tools are intended to help you assess students' work as accurately and consistently as possible by stating standards of performance for elements felt to be important within the curriculum as a whole or in specific modules. They also provide standards for "basic competencies" students should be able to demonstrate while engaging in learning.

The tools that have been developed are intended to be used as summative assessment tools. Depending on the way the classroom is organized, they may be used when the student has indicated he or she is ready for the final assessment or by the entire class at the end of the learning period.

Some tools in Enterprise and Innovation provide a standard 5-point rating scale to determine whether the level of competency is above standard, at standard or below standard. The tools generic to CTS have also been developed with a 5-point scale. It is recognized that this scale will have to be translated into a percentage mark for reporting purposes.

Tools Generic to Enterprise and Innovation

Within the applied context of Enterprise and Innovation, students have the opportunity of developing their social interaction skills by participating as a team member by working cooperatively with others and contributing to the group with ideas, suggestions and effort. The assessment tool, "Group Member Effectiveness Observation Form (E&IGRP) may be used in various Enterprise and Innovation modules.

Career exploration is integrated throughout the Enterprise and Innovation strand. The students will investigate career options where enterprise and innovation are particularly important. The assessment tool "Interview Guidelines", E&IITV has been developed for use throughout Enterprise and Innovation.

Tools Specific to Enterprise and Innovation Modules

The tools that have been developed to assess specific MLEs in a module are labelled with the module number and the tool number (e.g., E&I101-1). They are referred to under the conditions and criteria section.

Numerous assessment frameworks are included for module specific concepts, e.g.:

- venture planning
- financial planning
- marketing strategies

These assessment tools outline the criteria for assessment and the minimum performance rating using a 5-point scale.

Logbook record checklists are also included. Logbook entries are evaluated on a completion or non-completion basis.

In some instances where the tool suggested has been a test, a sample test or sample questions have been included. Sample checklists to assess basic competencies are included. Choose the one most appropriate. Assessment materials currently being used may continue to be used if they assess the criteria and conditions for an MLE.

Emphasis for Assessment

The “Suggested Emphasis” column provides a guideline for the relative significance of each MLE to assist in organizing for instruction. The basic competencies are expected to be integrated throughout and therefore the tools have been designed to assess the relevant basic competencies and the product, process and/or theory.

BASIC COMPETENCIES REFERENCE GUIDE

(This checklist is still being validated)

The following chart outlines basic competencies which students will endeavor to develop and enhance in each of the CTS strands and modules. Students' basic competencies should be assessed through observations involving the student, teacher(s), peers and others as they complete the requirements for each module. In general, there is a progression of task complexity and student initiative as outlined in the Development Framework*. As students progress through the Stages 1, 2, 3 and 4 of this reference guide, they build on the competencies gained in earlier stages. Students leaving high school should set themselves a goal of being able to demonstrate Stage 3 performance.

Suggested strategies for classroom use include:

- having students rate themselves and each other
- using for a reflective conversation between teacher and student
- highlighting areas of strength
- tracking growth in various CTS strands
- highlighting areas upon which to focus
- including in student's portfolio

Stage 1— The student:	Stage 2— The student:	Stage 3— The student:	Stage 4— The student:
Managing Learning ☐ comes to class prepared for learning ☐ follows basic instructions as directed ☐ acquires specialized knowledge, skills and attitudes ☐ identifies criteria for evaluating choices and making decisions ☐ uses a variety of learning strategies	 ☐ follows instructions with limited direction ☐ sets goals and establishes steps to achieve them with direction ☐ applies specialized knowledge, skills and attitudes in practical situations ☐ identifies and applies a range of effective strategies for solving problems and making decisions ☐ explores and uses a variety of learning strategies with limited direction	 ☐ follows detailed instructions on an independent basis ☐ sets clear goals and establish steps to achieve them ☐ transfers and applies specialized knowledge, skills and attitudes in a variety of situations ☐ uses a range of critical thinking skills to evaluate situations, solve problems and make decisions ☐ selects and uses effective learning strategies ☐ cooperates with others in the effective use of learning strategies	  ☐ demonstrates self-direction in learning, goal setting and goal achievement ☐ transfers and applies learning in new situations; demonstrates commitment to life-long learning ☐ thinks critically and acts logically to evaluate situations, solve problems and make decisions ☐ provides leadership in the effective use of learning strategies
Managing Resources ☐ adheres to established timelines; uses time/schedules/planners effectively ☐ uses information (material and human resources) as directed ☐ uses technology (facilities, equipment, supplies) as directed to perform a task or provide a service ☐ maintains, stores, and/or disposes of equipment and materials as directed	☐ creates and adheres to timelines with limited direction; uses time/schedules/planners effectively ☐ accesses and uses a range of relevant information (material and human resources) with limited direction ☐ uses technology (facilities, equipment, supplies) as appropriate to perform a task or provide a service with minimal assistance and supervision ☐ maintains, stores and/or disposes of equipment and materials with limited assistance	☐ creates and adheres to detailed timelines on an independent basis; prioritize task; use time/schedules/planners effectively ☐ accesses a range of information (material and human resources) and recognizes when additional resources are required ☐ selects and uses appropriate technology (facilities, equipment, supplies) to perform a task or provide a service on an independent basis ☐ maintains, stores and/or disposes of equipment and materials on an independent basis	☐ creates and adheres to detailed timelines; use time/schedules/planners effectively, prioritizing tasks on a consistent basis ☐ uses a wide range of information (material and human resources) in order to support and enhance the basic requirement ☐ recognizes the monetary and intrinsic value of managing technology (facilities, equipment, supplies) ☐ demonstrates effective techniques for managing facilities, equipment and supplies
Problem Solving and Innovation ☐ participates in problem solving as a process ☐ learns a range of problem-solving skills and approaches ☐ practices problem-solving skills by responding appropriately to a clearly defined problem, specified goals and constraints by: – generating alternatives – evaluating alternatives – selecting appropriate alternative(s) – taking action	☐ identifies the problem and selects an appropriate problem-solving approach responding appropriately to specified goals and constraints ☐ applies problem-solving skills to a directed or a self-directed activity by: – generating alternatives – evaluating alternatives – selecting appropriate alternative(s) – taking action	☐ thinks critically and acts logically in the context of problem solving ☐ transfers problem-solving skills to real-life situations by generating new possibilities ☐ prepares implementation plans ☐ recognizes risks	☐ identifies and resolves problems efficiently and effectively ☐ identifies and suggest new ideas to get the job done creatively by: – combining ideas or information new ways – making connections between seemingly unrelated ideas – actively seeking out opportunities

Stage 1— <i>The student:</i>	Stage 2— <i>The student:</i>	Stage 3— <i>The student:</i>	Stage 4— <i>The student:</i>
Communicating Effectively ☐ uses communication skills; e.g., reading, writing, illustrating, speaking ☐ uses language in appropriate context ☐ listens to understand and learn ☐ demonstrates positive interpersonal skills in selected contexts	☐ communicates thoughts, feelings, and ideas to justify or challenges a position using written, oral and visual means ☐ uses technical language appropriately ☐ listens and responds to understand and learn ☐ demonstrates positive interpersonal skills in many contexts	☐ prepares and effectively presents accurate, concise, written, visual and/or oral reports providing reasoned argument ☐ encourages, persuades, convinces or otherwise motivates individuals ☐ listens and responds to understand, learn and teach ☐ demonstrates positive interpersonal skills in most contexts	☐ negotiates effectively by working towards an agreement that may involve exchanging specific resources or resolving divergent interests ☐ negotiates and works towards a consensus ☐ listens and responds to understand, learn, teach and evaluate ☐ promotes positive interpersonal skills among others
Working with Others ☐ fulfills responsibility in a group project ☐ works collaboratively in structured situations with peer members ☐ acknowledges the opinions and contributions of others in the group	☐  ☐ cooperates to achieve group results ☐ maintains a balance between speaking, listening and responding in group discussion ☐ respects the feelings and views of others	☐ seeks a team approach as appropriate based on group needs and benefits e.g. idea potential, variety of strengths, sharing of work load ☐ works in a team or group: – encourages and supports team members – helps others in a positive manner – provides leadership/ fellowship as required – negotiates and works toward consensus as required	☐ leads, where appropriate, mobilizing the group for high performance ☐ understands and works within the context of the group ☐ prepares, validates and implements plans that reveal new possibilities
Demonstrating Responsibility Attendance ☐ demonstrates responsibility in attendance, punctuality and task completion Safety ☐ follows personal and environmental health and safety procedures ☐ identifies immediate hazards and their impact on self, others and the environment ☐ follows appropriate/emergency response procedures Ethics ☐ makes personal judgements about whether certain behaviour/ action is right or wrong	☐  ☐ recognizes and follows personal and environmental health and safety procedures ☐ identifies immediate and potential hazards and their impact on self, others and the environment ☐  ☐ assesses how personal judgements affect other peer members and/or family; e.g., home and school	☐  ☐ establishes and follows personal and environmental health and safety procedures ☐  ☐  ☐ assesses the implications of personal/group actions within the broader community; e.g., workplace	☐  ☐ transfers and applies personal and environmental health and safety procedures to a variety of environments and situations ☐  ☐  ☐ demonstrates accountability for actions taken to address immediate and potential hazards ☐ analyses the implications of personal/group actions within the global context ☐ states and defends a personal code of ethics as required
Developmental Framework★ • Simple task • Structured environment • Directed learning	• Task with limited variable • Less structured environment • Limited direction	• Task with multiple variables • Flexible environment • Self-directed learning, seeking assistance as required	• Complex task • Open environment • Self-directed/self-motivated

GENERAL RATING SCALE

S C A L E	RUBRIC STATEMENT (included in assessment tool/statements in <i>italics</i> are optional)	IS TASK/ PROJECT COMPLETED?	PROBLEM SOLVING: STUDENT INITIATIVE VS TEACHER DIRECTION/ SUPPORT	USE OF TOOLS, MATERIALS, PROCESSES	STANDARDS OF QUALITY/ PRODUCTIVITY	TEAMWORK LEADERSHIP	SERVICE CLIENT/ CUSTOMER
O	<i>The student:</i> has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.	Has not completed defined outcomes.		Tools, materials and/or processes are used inappropriately.			
1	meets defined outcomes. Follows a guided plan of action. A limited range of tool's, materials and/or processes are used appropriately. <i>Quality and productivity are reasonably consistent. Works cooperatively. Provides a limited range of customer/client services.</i>	Meets defined outcomes.	Follows a guided plan of action.	A limited range of tools, materials and/or processes are used appropriately.	<i>Quality and productivity are reasonably consistent.</i>	<i>Works cooperatively.</i>	<i>Provides a limited range of customer/client services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. <i>Quality and productivity are reasonably consistent. Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>	Meets defined outcomes.	Plans and solves problems with limited assistance.	Tools, materials and/or processes are selected and used appropriately.	<i>Quality and productivity are reasonably consistent.</i>	<i>Works cooperatively to achieve team goals.</i>	<i>Identifies and provides customer/client services.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. <i>Quality and productivity are consistent. Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>	Meets defined outcomes.	Plans and solves problems in a self- directed manner.	Tools, materials and/or processes are selected and used efficiently and effectively.	<i>Quality and productivity are consistent.</i>	<i>Works cooperatively and contributes ideas and suggestions that enhance team effort.</i>	<i>Analyzes and provides effective client/customer services.</i>
4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. <i>Quality, particularly details and finishes and productivity are consistent and exceed standards. Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>	Exceeds defined outcomes.	Plans and solves problems effectively and creatively in a self- directed manner.	Tools, materials and/or processes are selected and used efficiently, effectively and with confidence.	<i>Quality, particularly details and finishes and productivity are consistent and exceed standards.</i>	<i>Leads others to contribute team goals.</i>	<i>Analyzes and provides effective client/customer services beyond expectations.</i>

INTRODUCTORY	INTERMEDIATE	ADVANCED
<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree • poses an important question regarding the issue • accesses basic in-school/community information sources regarding the issue • uses one or more information-gathering techniques Analyzing Perspectives • clarifies different points of view regarding the issue; <i>e.g., social, economic, environmental</i> • states a position on the issue and logical reasons for adopting that position • states an opposing position on the issue and logical reasons for adopting that position • identifies sources of conflict among different positions • distinguishes between fact and fiction/opinion/theory Collaboration and Teamwork • shares work appropriately among group members • respects the views of others Evaluating Choices/Making Decisions • identifies useful alternatives regarding the issue • establishes criteria for assessing each alternative; <i>e.g., social, economic, environmental</i> • selects an appropriate alternative based on established criteria • reflects on strengths/weaknesses of decisions by considering consequences • communicates information in a logical sequence to justify choices/decisions made	<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree, explaining areas of disagreement • poses one or more thoughtful questions regarding the issue • accesses a range of relevant in-school/community resources • uses a range of information-gathering techniques Analyzing Perspectives • categorizes different points of view regarding the issue; <i>e.g., cultural, ethical, economic, environmental, health-related</i> • states a position on the issue and logical reasons for adopting that position • states two or more opposing positions on the issue and logical reasons for adopting each position • describes interrelationships among different perspectives/points of view • determines accuracy/currency/reliability of information and ideas Collaboration and Teamwork • shares work appropriately among group members • respects and considers the views of others • negotiates solutions to problems Evaluating Choices/Making Decisions • identifies important and appropriate alternatives regarding the issue • establishes knowledge- and value-based criteria for assessing each alternative; <i>e.g., social, economic, environmental</i> • selects an appropriate alternative by showing differences among choices • assesses strengths/weaknesses of decisions by considering consequences • communicates ideas in a logical sequence with supporting detail to justify choices/decisions made	<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree, explaining specific causes of disagreement • poses thoughtful questions regarding the issue • accesses a range of relevant information sources and recognizes when additional information is required • demonstrates resourcefulness in collecting data Analyzing Perspectives • categorizes different points of view regarding the issue; <i>e.g., cultural, ethical, economic, environmental, health-related, scientific, political</i> • states a position on the issue and insightful reasons for adopting that position • states three or more opposing positions on the issue and thoughtful reasons for adopting each position • analyzes interrelationships among different perspectives/points of view • recognizes underlying bias/assumptions/values in information and ideas Collaboration and Teamwork • shares work appropriately among group members • respects and considers the views of others • negotiates with sensitivity solutions to problems Evaluating Choices/Making Decisions • describes in detail important and appropriate alternatives regarding the issue • establishes knowledge- and value-based criteria for assessing each alternative; <i>e.g., social, economic, environmental</i> • selects an appropriate and useful alternative by showing differences among choices • assesses strengths/weaknesses of decisions by considering consequences and implications • communicates thoughts/feelings/ideas clearly to justify choices/decisions made

INTRODUCTORY	INTERMEDIATE	ADVANCED
<i>The student:</i> Management • prepares self for task • organizes and works in an orderly manner • carries out instructions accurately • uses time effectively Teamwork • cooperates with group members • shares work appropriately among group members Use of Equipment and Materials • selects and uses appropriate equipment/materials • follows safe procedures/techniques • weighs and measures accurately • returns clean equipment/materials to storage areas Investigative Techniques • gathers and applies information from at least one source • makes predictions that can be tested • sets up and conducts experiments to test a prediction • distinguishes between manipulated/responding variables • obtains results that can be used to determine if some aspect of the prediction is accurate • summarizes important experimental outcomes	<i>The student:</i> Management • prepares self for task • organizes and works in an orderly manner • interprets and carries out instructions accurately • plans and uses time effectively • adheres to routine procedures Teamwork • cooperates with group members • shares work appropriately among group members • negotiates solutions to problems Use of Equipment and Materials • selects and uses appropriate equipment/materials • models safe procedures/techniques • weighs and measures accurately • practises proper sanitation procedures • minimizes waste of materials • advises of potential hazards and necessary repairs Investigative Techniques • gathers and applies information from a variety of sources • makes predictions that can be tested • plans, sets up and conducts experiments to test a prediction • identifies and explains manipulated/responding variables • obtains accurate results that confirm/reject the prediction • summarizes and applies experimental outcomes	<i>The student:</i> Management • prepares self for task • organizes and works in an orderly manner • interprets and carries out instructions accurately • plans and uses time effectively in a logical sequence • displays leadership in adhering to routine procedures • attempts to solve problems prior to requesting help Teamwork • cooperates with group members • shares work appropriately among group members • negotiates with sensitivity solutions to problems • displays effective communication skills Use of Equipment and Materials • selects and uses equipment/materials independently • demonstrates concern for safe procedures/techniques • weighs and measures accurately and efficiently • practises proper sanitation procedures • minimizes waste of materials • anticipates potential hazards and emergency response Investigative Techniques • uses relevant information to explain observations • makes predictions that can be tested • plans, sets up and conducts experiments to test a prediction • analyzes relationships among manipulated/responding variables • obtains accurate results that confirm/reject prediction and answer related questions • summarizes, applies and evaluates experimental outcomes

INTRODUCTORY	INTERMEDIATE	ADVANCED
<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree • poses an important question regarding the issue • accesses basic in-school/community information sources regarding the issue • uses one or more information-gathering techniques Analyzing Perspectives • states a position on the issue and logical reasons for adopting that position • explains why the issue is important by presenting examples of possible consequences • clarifies different points of view regarding the issue; <i>e.g., social, economic, environmental</i> • distinguishes between fact and fiction/opinion/theory Collaboration and Teamwork • works with a range of peer members • shares information/opinions/suggestions through group discussion • listens to and respects the views of others Negotiating and Debating • presents a convincing argument in logical sequence supporting a position adopted on the issue • provides a relevant response to opposing arguments • speaks clearly so the argument can be understood • establishes a shared understanding of key alternatives and consequences relevant to the issue	<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree, explaining areas of disagreement • poses one or more thoughtful questions regarding the issue • accesses a range of relevant in-school/community resources • uses a range of information-gathering techniques Analyzing Perspectives • states a position on the issue and logical reasons for adopting that position • explains why the issue is important by presenting examples of possible consequences • categorizes different points of view regarding the issue; <i>e.g., cultural, ethical, economic, environmental, health-related</i> • determines accuracy/currency/reliability of information and ideas Collaboration and Teamwork • works with a range of peer members • shares information/opinions/suggestions, maintaining a balance between speaking and listening • listens to and respects the views of others, requesting clarification as necessary from other group members Negotiating and Debating • presents a convincing argument in logical sequence supporting a position adopted, conveying points in order of importance • provides a relevant and convincing response to opposing arguments • speaks clearly without hesitation so the argument can be understood • negotiates a shared agreement on preferred alternatives relevant to the issue	<i>The student:</i> Preparation and Planning • accurately describes an issue on which people disagree, explaining specific causes of disagreement • poses thoughtful questions regarding the issue • accesses a range of relevant information sources and recognizes when additional information is required • demonstrates resourcefulness in collecting data Analyzing Perspectives • states a position on the issue and insightful reasons for adopting that position • explains why the issue is important by presenting examples of possible consequences and implications • categorizes different points of view regarding the issue; <i>e.g., cultural, ethical, economic, environmental, health-related, scientific, political</i> • recognizes underlying bias/assumptions/values in information and ideas Collaboration and Teamwork • works with a wide range of peer members • shares information/opinions/suggestions, maintaining a balance between speaking and listening • listens to and respects the views of others, requesting clarification as necessary from other group members Negotiating and Debating • presents a convincing argument in logical sequence supporting a position adopted, conveying points in order of importance and backing each with sound evidence • provides a relevant and convincing rebuttal to opposing arguments • speaks clearly without hesitation so the argument can be understood by all listeners • negotiates a shared agreement on preferred alternatives by resolving divergent points of view

INTRODUCTORY	INTERMEDIATE	ADVANCED
<i>The student:</i> Preparation and Planning • sets goals and follows instructions accurately • responds to directed questions and follows necessary steps to find answers • accesses basic in-school/community information sources • interprets and organizes information into a logical sequence • records information accurately, using correct technical terms • uses time effectively Presentation • demonstrates effective use of at least one medium of communication: <i>e.g., <u>Written:</u> spelling, punctuation, grammar, basic format</i> <i>Oral:</i> voice projection, body language <i>Audio-Visual:</i> techniques, tools • uses correct grammatical convention and technical terms through proofreading/editing • provides an introduction that describes the purpose of the project • communicates information in a logical sequence • states a conclusion based on a summary of facts • provides a reference list of three or more basic information sources	<i>The student:</i> Preparation and Planning • sets goals and describes steps to achieve them • uses personal initiative to formulate questions and find answers • accesses a range of relevant in-school/community resources • interprets, organizes and combines information into a logical sequence • records information accurately with appropriate supporting detail and using correct technical terms • plans and uses time effectively • gathers and responds to feedback regarding approach to task and project status Presentation • demonstrates effective use of at least two communication media: <i>e.g., <u>Written:</u> spelling, punctuation, grammar, format (formal/informal)</i> <i>Oral:</i> voice projection, body language, appearance <i>Audio-Visual:</i> techniques, tools, clarity • maintains acceptable grammatical and technical standards through proofreading and editing • provides an introduction that describes the purpose and scope of the project • communicates ideas into a logical sequence with sufficient supporting detail • states a conclusion by synthesizing the information gathered • provides a reference list that includes five or more relevant information sources	<i>The student:</i> Preparation and Planning • sets goals and describes steps to achieve them • uses personal initiative to formulate questions and find answers • accesses a range of relevant information sources and recognizes when additional information is required • interprets, organizes and combines information in creative and thoughtful ways • records information accurately, using appropriate technical terms and supporting detail • plans and uses time effectively, prioritizing tasks on a consistent basis • assesses and refines approach to task and project status based on feedback and reflection Presentation • demonstrates effective use of a variety of communication media: <i>e.g., <u>Written:</u> spelling, punctuation, grammar, format (formal/informal, technical/literary)</i> <i>Oral:</i> voice projection, body language, appearance, enthusiasm, evidence of prior practice <i>Audio-Visual:</i> techniques, tools, clarity, speed and pacing • maintains acceptable grammatical and technical standards through proofreading and editing • provides an introduction that describes the purpose and scope of the project • communicates thoughts/feelings/ideas clearly to justify or challenge a position • states a conclusion by analyzing and synthesizing the information gathered • gives evidence of adequate research through a reference list including seven or more relevant information sources

INTRODUCTORY	INTERMEDIATE	ADVANCED
<i>The student:</i> Preparation and Planning • sets goals and follows instructions accurately • adheres to established timelines • responds to directed questions and follows necessary steps to find answers • uses time effectively Information Gathering and Processing • accesses basic in-school/community information sources • uses one or more information-gathering techniques • interprets and organizes information in a logical sequence • records information accurately, using correct technical terms • distinguishes between fact and fiction/opinion/theory • responds to feedback when current approach is not working Collaboration and Teamwork • cooperates with group members • shares work appropriately among group members Information Sharing • demonstrates effective use of one or more communication media; <i>e.g., written, oral, audio-visual</i> • communicates information in a logical sequence • uses correct grammatical convention and technical terms • cites three or more basic information sources	<i>The student:</i> Preparation and Planning • sets goals and establishes steps to achieve them • creates and adheres to useful timelines • uses personal initiative to formulate questions and find answers • plans and uses time effectively Information Gathering and Processing • accesses a range of relevant in-school/community resources • uses a range of information-gathering techniques • interprets, organizes and combines information into a logical sequence • records information accurately with appropriate supporting detail and using correct technical terms • determines accuracy/currency/reliability of information sources • gathers and responds to feedback regarding approach to the task Collaboration and Teamwork • cooperates with group members • shares work appropriately among group members • negotiates solutions to problems Information Sharing • demonstrates effective use of two or more communication media; <i>e.g., written, oral, audio-visual</i> • communicates ideas in a logical sequence with sufficient supporting detail • maintains acceptable grammatical and technical standards • cites five or more relevant information sources	<i>The student:</i> Preparation and Planning • sets clear goals and establishes steps to achieve them • creates and adheres to detailed timelines • uses personal initiative to formulate questions and find answers • plans and uses time effectively, prioritizing tasks on a consistent basis Information Gathering and Processing • accesses a range of relevant information sources and recognizes when additional information is required • demonstrates resourcefulness in collecting data • interprets, organizes and combines information in creative and thoughtful ways • records information accurately with appropriate supporting detail and using correct technical terms • recognizes underlying bias/assumptions/values in information sources • assesses and refines approach to the task and project status based on feedback and reflection Collaboration and Teamwork • cooperates with group members • shares work appropriately among group members • negotiates with sensitivity solutions to problems • displays effective communication and leadership skills Information Sharing • demonstrates effective use of a variety of communication media; <i>e.g., written, oral, audio-visual</i> • communicates thoughts/feelings/ideas clearly to justify or challenge a position • maintains acceptable grammatical and technical standards • gives evidence of adequate information gathering by citing seven or more relevant information sources

GROUP MEMBER EFFECTIVENESS OBSERVATION FORM**E&IGRP**

Name: _____

Date: _____

Observations: 4 = Always; 3 = Frequently; 2 = Occasionally; 1 = Never

Project: _____ Group: _____	Observations			
Standard	4	3	2	1
was on time	☐	☐	☐	☐
attended group sessions	☐	☐	☐	☐
took an active part and contributed information and ideas	☐	☐	☐	☐
had a positive, rather than negative or critical, approach	☐	☐	☐	☐
listened when others spoke	☐	☐	☐	☐
respected and interacted with other members	☐	☐	☐	☐
respected individual differences	☐	☐	☐	☐
avoided prejudice and kept biases out	☐	☐	☐	☐
was open to the ideas and suggestions of others	☐	☐	☐	☐
encouraged non-contributors to take part	☐	☐	☐	☐
accepted responsibility for the consequences of his/her behaviour	☐	☐	☐	☐
was sensitive to the feelings and concerns of others	☐	☐	☐	☐
was genuine and open	☐	☐	☐	☐
supported others and helped them articulate their ideas	☐	☐	☐	☐
helped the group by summarizing, clarifying, mediating, praising and encouraging	☐	☐	☐	☐
Strategies for Improvement 				

INTERVIEW GUIDELINES**E&ITV**

Name: _____

Date: _____

Entrepreneur's Name: _____

Signature or Business Stamp: _____

Module Learner Expectation*The student will:*

- investigate career options where enterprise and innovation are particularly important

Instructions

- Students must ask a minimum of three questions pertaining to each category and record the responses.
- Interview assessment is evaluated on a completion or non-completion basis.

Questions	Responses
Entrepreneur's Background ☐ _____ ☐ _____ ☐ _____	☐ _____ ☐ _____ ☐ _____
Early Stage of Business ☐ _____ ☐ _____ ☐ _____	☐ _____ ☐ _____ ☐ _____
Development of the Business ☐ _____ ☐ _____ ☐ _____	☐ _____ ☐ _____ ☐ _____
Personal Advice and/or Observations from the Entrepreneur ☐ _____ ☐ _____ ☐ _____	☐ _____ ☐ _____ ☐ _____
Comments 	

Module Learner Expectation

The student will:

- apply strategies and develop competencies in:
 - identifying opportunities
 - creating and generating ideas
 - establishing needs, wants and priorities
 - assessing alternatives
 - assessing environmental impact
- investigating career options where enterprise and innovation are particularly important

Instructions

- Logbook entries are evaluated on a completion or non-completion basis.

The logbook record should consist of a minimum of three of the following:

- ☐ A minimum of 20 ideas generated on a given example (e.g., a list of possible uses for a brick)
- ☐ A record of when ideas were shared in a group setting with a description of how the group applied such strategies as piggybacking, brainstorming and mindmapping to further develop group members' ideas
- ☐ A personal list of needs, wants and priorities (minimum of 30 of each)
- ☐ An analysis of student's effectiveness as a group member (group work may be assessed by teacher and/or peers, using the Group Member Effectiveness Observation Form: E&IGRP)
- ☐ A written record of an interview with an entrepreneur (using the Interview Guidelines: E&IITV)
- ☐ A completed "Entrepreneurial Self-Assessment Checklist"
- ☐ An entrepreneurial self-analysis indicating five strong characteristics and five characteristics he or she can improve upon and a plan of action.

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

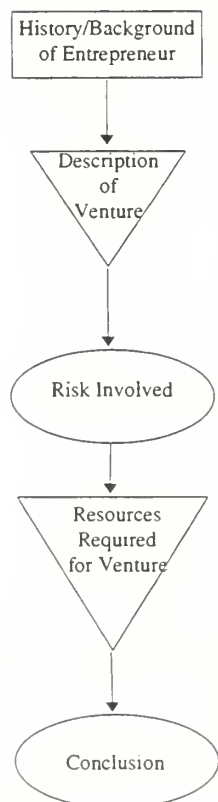
- identify, compare and assess a variety of venture opportunities

STANDARD IS 1 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Flow Chart



Venture 1	Venture 2	Venture 3	Venture 4	Criteria	Rating Scale				
(Student Work)					4	3	2	1	0
				☐ Name of Entrepreneur ☐ Training/Education ☐ Previous Employment/Experience ☐ Area of Expertise	☐	☐	☐	☐	☐
				☐ Name of Venture ☐ Product/Service Description ☐ Target Market ☐ Size of Business ☐ Type of Ownership ☐ What specific need/opportunity has been addressed by the venture?	☐	☐	☐	☐	☐
				☐ What risks are involved? ☐ Major risks ☐ Minor risks ☐ Which risks are controllable and which are beyond control?	☐	☐	☐	☐	☐
				☐ Start Up Costs ☐ Source of Financial Backing ☐ Advertising Costs ☐ Materials/Supplies Required ☐ Location/Overhead Costs ☐ Staffing for Venture ☐ Opportunity Costs ☐ Research or Product Development ☐ Environmental Impact	☐	☐	☐	☐	☐
				☐ Which venture has most potential? ☐ Justification	☐	☐	☐	☐	☐

Module Learner Expectation

The student will:

- describe the process and components of a venture plan

Name: _____

Date: _____

1. List one advantage and one disadvantage to each of the following:

	Advantage	Disadvantage
a. starting a business from scratch		
b. purchasing an existing business		
c. purchasing a franchise		
d. becoming involved in network marketing		
e. sole proprietorship		
f. partnership		
g. corporation		

14

2. Name five areas that a business plan must cover/explain.

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

10

3. **Assumption:** The school that you attend does NOT have a cafeteria or “convenience store”. As a budding entrepreneur, you recognize that a small store would do well in your school. Answer the following questions as they pertain to the idea of bringing a store into your school.

a. List 10 items that you think would sell well in your store (keep in mind legal and ethical components).

10

b. How will you staff your “store” when you are attending classes?

2

c. Determine the best way possible to advertise your store and any specials that you will offer on a daily basis.

2

d. Students in high school love to “win prizes”. Come up with a feasible plan to promote ANOTHER local store in your community while still enticing your high school customers to support your own establishment.

2

4. **Assumption:** You are an experienced entrepreneur and you recognize the tremendous need for pulp and paper mill in your community. You are beginning your business plan and need to address some issues that your community will be concerned about. In each of the areas outlined below, determine an area of major concern that your community will want answered. Determine the potential problem and how you will go about solving it to their satisfaction.

a. Environmental Issue

Problem: _____ 2

Solution: _____ 3

b. Business Regulation Issue

Problem: _____ 2

Solution: _____ 3

TOTAL = 50

Student Name: _____

Date: _____

Module Learner Expectations

The student will:

- apply personal goal-setting and problem-solving strategies that facilitate change effectively
- assess potential risks and propose strategies for assessing risks
- develop strategies for securing resources and support to implement a venture
- select, plan and assess a venture

STANDARD IS 1 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Research Components					
Define the task	☐	☐	☐	☐	☐
Seek and gather various sources of information	☐	☐	☐	☐	☐
Organize information in a logical manner	☐	☐	☐	☐	☐
Analyze information	☐	☐	☐	☐	☐
Extract the appropriate information from identified resources/materials to produce new information	☐	☐	☐	☐	☐
Communicate the process involved in preparing the plan	☐	☐	☐	☐	☐
Predict the probability that the suggested outcomes or consequences of the plan were to occur	☐	☐	☐	☐	☐
Make a judgement on the feasibility of the venture plan	☐	☐	☐	☐	☐
Technical Components					
Legible	☐	☐	☐	☐	☐
Free of spelling/proofreading errors	☐	☐	☐	☐	☐
Correct grammar/communication style	☐	☐	☐	☐	☐
Professional appearance/appropriate format	☐	☐	☐	☐	☐
Appropriate use of white space	☐	☐	☐	☐	☐
Page headings	☐	☐	☐	☐	☐
Line spacing	☐	☐	☐	☐	☐
Document free of smudges and wrinkles	☐	☐	☐	☐	☐
Content					
Opportunity is identified	☐	☐	☐	☐	☐
Opportunity is assessed (rationale)	☐	☐	☐	☐	☐
Idea is formulated based on the identified opportunity	☐	☐	☐	☐	☐
Idea is assessed based on specified criteria	☐	☐	☐	☐	☐
Overall goal and objectives of the venture are identified	☐	☐	☐	☐	☐
Implementation and management strategy is organized	☐	☐	☐	☐	☐
Risks involved are assessed	☐	☐	☐	☐	☐
Finances and funding information are prepared	☐	☐	☐	☐	☐
Back-up strategy is developed	☐	☐	☐	☐	☐
Opportunity costs are considered	☐	☐	☐	☐	☐

Date: _____

Student Name: _____

Module Learner Expectations
The student will:

- demonstrate qualities that initiate
 - initiative
 - flexibility
 - leadership/team member
- consider career options

STANDARD IS 1 IN EACH APPLICABLE AREA

Rating Scale (<i>italics are optional</i>): <i>The student:</i>	
4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Preparation and Planning					
• set goals and follow instructions accurately	☐	☐	☐	☐	☐
• formulate questions and find answers	☐	☐	☐	☐	☐
• access relevant in-school/community resources	☐	☐	☐	☐	☐
• interpret and organize information into a logical sequence	☐	☐	☐	☐	☐
• record information accurately	☐	☐	☐	☐	☐
• use time effectively	☐	☐	☐	☐	☐
Technical Components					
• demonstrate effective use of one or more communication media: e.g., <u>Written</u> : spelling, punctuation, grammar	☐	☐	☐	☐	☐
<u>Oral</u> : voice projection, body language	☐	☐	☐	☐	☐
<u>Audio-Visual</u> : techniques, tools	☐	☐	☐	☐	☐
• use correct grammatical convention and technical terms	☐	☐	☐	☐	☐
• provide an introduction that describes the purpose of the project	☐	☐	☐	☐	☐
• communicate information in a logical sequence	☐	☐	☐	☐	☐
• state a conclusion based on a summary of facts	☐	☐	☐	☐	☐
• provide a reference list of important information sources	☐	☐	☐	☐	☐
Content					
• Initiative	☐	☐	☐	☐	☐
• Flexibility	☐	☐	☐	☐	☐
• Leadership	☐	☐	☐	☐	☐
• Team member	☐	☐	☐	☐	☐

Module Learner Expectations

The student will:

- demonstrate qualities that initiate
 - initiative
 - flexibility
 - leadership/team member
- consider career options

Instructions

- Logbook entries are evaluated on a completion or non-completion basis.

The logbook record will consist of:

- ☐ Three personal goals in relation to Enterprise and Innovation addressing:
 - student input into course
 - what student hopes to obtain from the course.
- ☐ Three career goals including:
 - career research where entrepreneurial skills are important
 - an interview with an entrepreneur (using the Interview Guidelines: E&IITV)
 - evidence of a minimum of two hours volunteer work with a community member/organization.
- ☐ Summary of a magazine or newspaper article pertaining to business and/or entrepreneurship. Summary will include:
 - five main points
 - statement of author's point of view
 - student perspective on the article
 - technical components; e.g., title, date, etc.
- ☐ A personal evaluation of:
 - what he or she has contributed to the venture so far
 - how he or she could improve on future contributions.
- ☐ A description of team-building exercise (e.g., stranded on a desert island and students must create a survival plan as a team), how it was implemented and an evaluation of the exercise.

Date: _____

Student Name: _____

Module Learner Expectations
The student will:

- describe and apply various methodologies for analyzing ventures:
 - market analysis
 - industry analysis
 - financial analysis
 - product/service evaluation

STANDARD IS 2 IN EACH APPLICABLE AREA
Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Oral Presentation					
Voice projection and enthusiasm/speed and pacing	☐	☐	☐	☐	☐
Body language	☐	☐	☐	☐	☐
Appearance	☐	☐	☐	☐	☐
Demonstrates knowledge of venture expansion	☐	☐	☐	☐	☐
Logical sequence in presentation	☐	☐	☐	☐	☐
Provides an introduction that describes the purpose and scope of the venture	☐	☐	☐	☐	☐
States a conclusion synthesizing information presented					
OR					
Technical Components (Written)					
Legible	☐	☐	☐	☐	☐
Free of spelling/proofreading errors	☐	☐	☐	☐	☐
Professional appearance/appropriate format	☐	☐	☐	☐	☐
Appropriate use of white spaces	☐	☐	☐	☐	☐
Page headings	☐	☐	☐	☐	☐
Line spacing	☐	☐	☐	☐	☐
Document free of smudges and wrinkles	☐	☐	☐	☐	☐

Criteria	Rating Scale				
	4	3	2	1	0
Content					
Addresses specific questions regarding the product/service quality	☐	☐	☐	☐	☐
Addresses areas for product/service improvement	☐	☐	☐	☐	☐
Addresses demographics of respondent	☐	☐	☐	☐	☐
Contains appropriate, targeted questions	☐	☐	☐	☐	☐
Easy to read and understand	☐	☐	☐	☐	☐
An appropriate length	☐	☐	☐	☐	☐
Logical order to questions	☐	☐	☐	☐	☐
Implemented 26 – 50 questionnaires	☐	☐	☐	☐	☐
Interpretation of survey results:					
tabulated numerical results (e.g., 15/20 liked the product)	☐	☐	☐	☐	☐
listed, under appropriate headings, general information gathered	☐	☐	☐	☐	☐
presented results in graph form to illustrate results	☐	☐	☐	☐	☐
written or oral report on the results of the survey	☐	☐	☐	☐	☐
Determine how the results should affect the venture	☐	☐	☐	☐	☐
Conclusion that supports their analysis of the survey results	☐	☐	☐	☐	☐
Comments					

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- analyze the research, compare a variety of ventures and make informed decisions about the feasibility of each venture

STANDARD IS 2 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Venture 1	Venture 2	Criteria	Rating Scale				
			4	3	2	1	0
		Analysis (choose any five of the following after reading the two chosen case studies) - Compare and contrast the human resources component of the two ventures. Determine what skills and abilities and/or characteristics each venture requires from its people and whether or not they achieved their goal from their employees. - Identify and explain the similarities and differences between the two ventures' production concepts. Justify how any problems encountered assisted in the success or demise of the venture. - How did the two ventures differ in their management styles. Explain how their management styles affected the overall outcome of the venture. - What effect did the various marketing ideas employed by each venture have on the overall outcome? Propose two additional marketing ideas for each venture - The distribution of a product/service to the consumer has a profound impact on the success of the company. Explain the effect of the distribution methods for the two ventures analyzed. - From the articles, determine the general acceptance of the product/service by the consumer. Propose how each venture could have improved its public relations for their given idea. - Explain the effects of the competition on the two ventures you have studied. Identify how the ventures dealt with the competition and propose an additional strategy on how each venture could stay a step ahead of their competition. - Explain any legal concerns the ventures had to address in their start-up or implementing phases of their business. Determine how these legal concerns could have been avoided or eliminated.					
		Conclusion decision on the feasibility of the venture is logical and reflects the information they have analyzed from above.					

Module Learner Expectations

The student will:

- analyze the advantages and disadvantages of financial options
- examine various sources of financing ventures

Instructions

- Two of the four options must be completed.

Standard

- For each option, a minimum of four of the five activities are completed.

Option 1 “Entrepreneurial Description”

Read a book or a feature magazine article on a major corporation, family business, or a CEO of a major firm.

- ☐ Detailed description of the entrepreneurial venture and/or the entrepreneur.
- ☐ Summary of the student’s favourite part.
- ☐ Why the student enjoyed it.
- ☐ A summary of what the student learned.
- ☐ Written or presented in a professional manner.

Option 3 “Guest Speaker or Field Trip”

Arrange a guest speaker and/or field trip related to: determining franchise operations; and bank personnel discussing the advantages and disadvantages of equity financing and debt financing.

- ☐ Student(s) provide a classroom preamble of the guest speaker or field trip.
- ☐ Students who organized guest speaker or field trip must provide a minimum of ten question worksheet for the class to complete and evaluation after the trip or speaker.
- ☐ A written summary of the evaluation from the worksheet provided.
- ☐ Self-evaluation of the completed task.
- ☐ Written or presented in a professional manner.

Option 2 “Financial Institutions”

Prepare a collage or bulletin board display which features pamphlets appropriate for business ventures collected from various financial institutions.

- ☐ Appropriateness.
- ☐ Variety of financing options from various institutions.
- ☐ Creativity of Layout.
- ☐ Provide a caption that summarizes the major point(s) of each pamphlet.
- ☐ Written or presented in a professional manner.

Option 4 “Organizational Examples”

Debate of various financing options.

- ☐ Clarity
- ☐ Arguments
- ☐ Illustrations and Examples
- ☐ Organization
- ☐ Enthusiasm and Confidence.

Module Learner Expectation

The student will:

- distinguish between short- and long-term financing

Instructions

- Given three specific scenarios, the students must provide an amortization table for each by either using a spreadsheet program or visiting a local financial institution.

Standard

- For each scenario, a minimum of four of the five activities are completed.

Possible Scenarios

1. Prepare an amortization table for the purchase of a retail outlet, value \$100 000 at either the current interest rate or a fixed rate of 10% for the following periods of time:

15 years 20 years 25 years	}	monthly payments
--	---	------------------
2. Prepare an amortization table for the purchase of a limousine for a limo service, value \$85 000 payable over 8 years at the following interest rates:
 - a. $6\frac{5}{8}\%$
 - b. $7\frac{1}{2}\%$
 - c. current bank rate for automobile loans.
3. Prepare an amortization table for the purchase of a stereo system for your business, value \$3200 with the following rates:
 - a. Stereo's R Us: 10.5% over 2 years
 - b. World Wide Stereo: 5% over 18 months
 - c. Sara's Stereo Superstore: 9.75% over 36 months.

Criteria for Evaluation

- ☐ All required amortization tables completed accurately.
- ☐ Total interest paid for each case is clearly identified.
- ☐ In each scenario, students must provide a logical analysis of the best possible scenario.
- ☐ Amortization project is presented in a professional format.
- ☐ Students provide a written explanation of the value of an amortization table in personal or business financing.

Module Learner Expectation

The student will:

- demonstrate the process of applying for different types of financing

Instructions

- Two application forms are completed.

Standard

- Given the checklist below, the application forms must meet all of the criteria.

Criteria for Consideration

- ☐ Legible
- ☐ Must be in ink/typewritten
- ☐ Accurate information
- ☐ Free of errors
- ☐ Appropriate use of capitalization
- ☐ Professional appearance

Module Learner Expectation

The student will:

- demonstrate the process of applying for different types of financing

Instructions

- Students must research one of the following options.

Standard

- For selected option, a minimum of four of the activities are completed.

The student prepares a financial plan that covers:

Option 1: Personal finances including research on:

- ☐ RRSP's
- ☐ RRIF's
- ☐ RESP's
- ☐ mortgages
- ☐ loans – auto
- ☐ credit cards
- ☐ investments:
 - stock market
 - bonds (CSB)
 - pooled funds
 - life insurance

OR

Option 2: Business ventures including research on different financing available from:

- ☐ Equity sources:
 - venture capitalists
 - family and friends
 - partnerships
 - shares
- ☐ Debt financing:
 - Federal Business Development Bank
 - Federal Small Business Loans
 - Banks
 - Loan Sharks
- ☐ Other types of financing:
 - societies
 - foundations
 - governments
- ☐ Sample statements of:
 - start-up costs
 - income statements
 - balance sheets
 - cash flow
- ☐ Evaluation of the risks

FRAMEWORK FOR ASSESSING MARKETING STRATEGIES OF ENTREPRENEURIAL VENTURES

E&I203-1

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- analyze various marketing strategies for their applicability in terms of marketing mix for a target market

STANDARD IS 2 IN EACH APPLICABLE AREA

Recommended that students analyze businesses within their community.

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Venture 1	Venture 2	Criteria	Rating Scale				
			4	3	2	1	0
		Name/Type of Venture:					
		Target Market:					
		Product/Service Description:					
		Price:					
		Place:					
		Promotion:					

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- formulate and implement a marketing strategy for a particular venture
- appraise the strengths and weaknesses of the marketing strategy, and revise as necessary

STANDARD IS 2 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Research Components					
Define the task	☐	☐	☐	☐	☐
Seek and gather various sources of information	☐	☐	☐	☐	☐
Organize information in a logical manner	☐	☐	☐	☐	☐
Analyze information	☐	☐	☐	☐	☐
Extract the appropriate information from identified resources/materials to produce new information	☐	☐	☐	☐	☐
Communicate the process involved in preparing the plan	☐	☐	☐	☐	☐
Predict the probability that the suggested outcomes or consequences of the plan were to occur	☐	☐	☐	☐	☐
Make a judgement on the feasibility of the venture plan	☐	☐	☐	☐	☐
Technical Components					
Legible	☐	☐	☐	☐	☐
Free of spelling/proof-reading errors	☐	☐	☐	☐	☐
Correct grammar/communication style	☐	☐	☐	☐	☐
Professional appearance/appropriate format	☐	☐	☐	☐	☐
Appropriate use of white space	☐	☐	☐	☐	☐
Page headings	☐	☐	☐	☐	☐
Line spacing	☐	☐	☐	☐	☐
Document free of smudges and wrinkles	☐	☐	☐	☐	☐
Content					
Description of product/service	☐	☐	☐	☐	☐
Description of customer and target market	☐	☐	☐	☐	☐
Size of potential market	☐	☐	☐	☐	☐
Competition	☐	☐	☐	☐	☐
Suppliers	☐	☐	☐	☐	☐
Pricing strategy	☐	☐	☐	☐	☐
Place strategy	☐	☐	☐	☐	☐
Promotion strategy	☐	☐	☐	☐	☐
Sales projection	☐	☐	☐	☐	☐
External opportunities and threats	☐	☐	☐	☐	☐
Revisions to the marketing plan based on the strengths and weaknesses of the ongoing marketing strategy after implementation of the venture	☐	☐	☐	☐	☐

Module Learner Expectations

The student will:

- implement a venture
- establish management procedures required to start the venture

Instructions

- Logbook entries are evaluated on a completion or non-completion basis.

The logbook record will consist of:

☐ Timeline which may include the following (done by flow chart or on calendar sheets, continuum):

- select a product/service (if not previously chosen)
- business plan completion date
- financing the venture (share selling)
- ordering/purchasing of product or raw materials
- production phase
- marketing phase
- liquidation of company and final assessment.

Suggested procedures in the areas of:

☐ Managing

- organizational structure

☐ Marketing

- implementation of the 4-P's of marketing

☐ Financing

- cash flow analysis
- income statement
- balance sheet
- financial controls

☐ Human Resource Requirements

- conflict resolution
- leadership
- roles of group members/skills brought into venture
- job description for group members

☐ Producing/Service Requirements

- planning production process
- customer service
- warranty or customer follow-up.

Module Learner Expectation

The student will:

- demonstrate leadership qualities in implementing the venture

Standard

- Given the criteria as outlined, the student must provide supportive evidence (written or a verbal) for 5 of the 9 criteria.

Criteria for Consideration

- ☐ Team leader
- ☐ High energy level
- ☐ Creativity
- ☐ Innovation
- ☐ Instinct
- ☐ Ability to inspire
- ☐ Motivator
- ☐ Ability to communicate
- ☐ Problem solver

Date: _____

Student Name: _____

Module Learner Expectations
The student will:

- manage problem solving and decision making at each implementation stage of the venture

STANDARD IS 2 IN EACH APPLICABLE AREA
Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. Works cooperatively to achieve team goals. Identifies and provides customer/client services.
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Oral Presentation					
– Voice projection, clarity, speed and pacing	☐	☐	☐	☐	☐
– Body language	☐	☐	☐	☐	☐
– Appearance	☐	☐	☐	☐	☐
– Demonstrates knowledge of venture	☐	☐	☐	☐	☐
– Logical sequence in presentation	☐	☐	☐	☐	☐
– Provides an introduction that describes the purpose and scope of the venture	☐	☐	☐	☐	☐
– States a conclusion synthesizing information presented	☐	☐	☐	☐	☐
Technical Components (Written)					
– Legible	☐	☐	☐	☐	☐
– Free of spelling/proof-reading errors	☐	☐	☐	☐	☐
– Correct grammar/communication style	☐	☐	☐	☐	☐
– Professional appearance/appropriate format	☐	☐	☐	☐	☐
– Appropriate use of white spaces	☐	☐	☐	☐	☐
– Page headings	☐	☐	☐	☐	☐
– Line spacing	☐	☐	☐	☐	☐
– Document free of smudges and wrinkles	☐	☐	☐	☐	☐
Contents					
The student must demonstrate at least two decisions made at solving problems at each of the implementation stages outlined below:					
– Starting the venture	☐	☐	☐	☐	☐
– Managing the venture	☐	☐	☐	☐	☐
– Marketing the venture	☐	☐	☐	☐	☐
– Financing the venture	☐	☐	☐	☐	☐
– Human resources requirements	☐	☐	☐	☐	☐
– Producing/servicing requirements of the venture	☐	☐	☐	☐	☐
Comments					

Module Learner Expectation

The student will:

- assess the venture

Standard

- The venture assessment includes a minimum of 5 criteria and supporting evidence.

Suggested Method

- Review how to analyze opportunities and ideas (such as page 142 and pages 152–159 of Liepner text)
- Have students discuss or write answers to the following SUGGESTED questions:
 - Was there a 'need' for my product or service?
 - Was the price competitive?
 - What kind of customer service policy or warranty can I offer for my product or service?
 - Was my marketing strategy successful?
 - What could be done to improve it?
 - If this venture idea was your sole income, what would you propose in order to make it a viable source of income?
- With these questions in mind, develop a set of criteria that an entrepreneur should consider to assess the success of his/her venture. That is, how do you know your venture was successful?
- Apply the criteria to your own venture, using specific examples and assess its success.

Note: Some suggested criteria to look for:

- ☐ solid research backed the idea
- ☐ took calculated risks
- ☐ solved customer service problems
- ☐ generated new ideas to take company in a new direction
- ☐ there was a demand (or need) for my product or service
- ☐ price was competitive
- ☐ company was profitable
- ☐ learning experiences were varied and valuable

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- manage the venture by performing the following functions
 - planning
 - organizing
 - managing human resources
 - managing finances
 - monitoring
- establish management procedures necessary to implement the venture

STANDARD IS 3 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
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0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
A. Organizational Chart (include a minimum of 3 of the following):					
• Shows hierarchy of management	☐	☐	☐	☐	☐
• Depicts lines of communication	☐	☐	☐	☐	☐
• Appropriate job titles	☐	☐	☐	☐	☐
• Professional appearance/appropriate format	☐	☐	☐	☐	☐
• Legible	☐	☐	☐	☐	☐
B. Portfolio (include a minimum of 5 of the following):					
For each job title, describe:					
• management functions	☐	☐	☐	☐	☐
• components of effective leadership	☐	☐	☐	☐	☐
• motivation	☐	☐	☐	☐	☐
• communication	☐	☐	☐	☐	☐
• conflict resolution	☐	☐	☐	☐	☐
• planning	☐	☐	☐	☐	☐
• organizing	☐	☐	☐	☐	☐
• directing	☐	☐	☐	☐	☐
• controlling	☐	☐	☐	☐	☐
• team building	☐	☐	☐	☐	☐

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

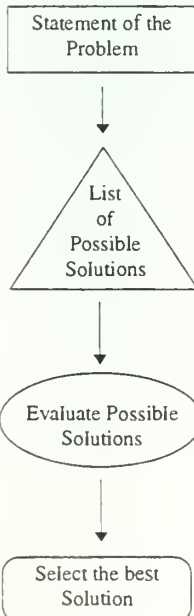
- examine critical risks and develop contingency procedures

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
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0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

STANDARD IS 3 IN EACH APPLICABLE AREA

Flow Chart



Problem Scenario #1	Problem Scenario #2	Problem Scenario #3	Criteria	Rating Scale				
(Student Work)				4	3	2	1	0
			☐ Review of Scenario ☐ Identify present situation versus desired situation ☐ Clear statement of Problem	☐	☐	☐	☐	☐
			☐ Apply rules and principles to new situations ☐ Combine ideas or information in new ways ☐ Develop a variety of solutions based on concrete rationale.	☐	☐	☐	☐	☐
			☐ Draw and defend solutions ☐ Evaluate based on - creative ideas - devil's advocate approach - facts, figures, information	☐	☐	☐	☐	☐
			☐ All criteria considered ☐ Based on the most positive outcome for the company/situation ☐ Impact of the solution - environmental - social - ethical - legal	☐	☐	☐	☐	☐

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- monitor the venture plan, and revise as necessary

STANDARD IS 3 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
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0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Oral Presentation					
• Voice projection, clarity, speed and pacing	☐	☐	☐	☐	☐
• Body language	☐	☐	☐	☐	☐
• Appearance	☐	☐	☐	☐	☐
• Demonstrates knowledge on venture status	☐	☐	☐	☐	☐
• Logical sequence in presentation	☐	☐	☐	☐	☐
• Provides an introduction that describes the venture and its position	☐	☐	☐	☐	☐
• States a conclusion synthesizing the information presented	☐	☐	☐	☐	☐
Content					
• Review conceptual and planning stages	☐	☐	☐	☐	☐
• Outline perceived risks and risk management strategies	☐	☐	☐	☐	☐
• Update venture progress to date	☐	☐	☐	☐	☐
• Review current position of the venture in financial and management terms	☐	☐	☐	☐	☐
• Highlight the strengths of the venture	☐	☐	☐	☐	☐
• Outline the weaknesses of the venture	☐	☐	☐	☐	☐
• Propose a plan to capitalize on the strengths and revise the weaknesses	☐	☐	☐	☐	☐
• Outline learning experiences throughout the venture process	☐	☐	☐	☐	☐
Comments					

Module Learner Expectation

The student will:

- monitor the venture plan and revise as necessary

Instructions

- Reflection record is evaluated on a completion or non-completion basis
- Implementation of this tool could be:
 - given the criteria as outlined below, the student must meet 5 of the 9 criteria
 - given the criteria as outlined, the student must provide supportive evidence in a written or a verbal explanation. Leadership qualities should have been demonstrated in relation to the implementation of their venture.

Criteria for Consideration

- ☐ Risk taker
- ☐ Setting an example of honesty
- ☐ Setting an example of fairness
- ☐ Providing direction to others
- ☐ Task oriented
- ☐ Goal oriented
- ☐ Ability to generate ideas
- ☐ Ability to make decisions
- ☐ Listening skills

Date: _____

Student Name: _____

Module Learner Expectations

The student will:

- analyze the rationale for expanding a particular venture
- evaluate the options available and develop expansion strategy
- compare personal philosophy with venture goals.

STANDARD IS 3 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
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0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Oral Presentation					
• Voice projection	☐	☐	☐	☐	☐
• Body language	☐	☐	☐	☐	☐
• Appearance	☐	☐	☐	☐	☐
• Demonstrates knowledge of venture	☐	☐	☐	☐	☐
• Logical sequence in presentation	☐	☐	☐	☐	☐
• Provides an introduction that describes the purpose and scope of the venture	☐	☐	☐	☐	☐
• States a conclusion synthesizing information presented	☐	☐	☐	☐	☐
OR					
Technical Components (Written)					
• Legible	☐	☐	☐	☐	☐
• Free of spelling/proof-reading errors	☐	☐	☐	☐	☐
• Correct grammar/communication style	☐	☐	☐	☐	☐
• Professional appearance/appropriate format	☐	☐	☐	☐	☐
• Appropriate use of white spaces	☐	☐	☐	☐	☐
• Page headings	☐	☐	☐	☐	☐
• Line spacing	☐	☐	☐	☐	☐
• Document free of smudges and wrinkles	☐	☐	☐	☐	☐
Contents					
The student must demonstrate at least two decisions made under each major heading given the suggestions as outlined below:					
• Rationale for expansion					
– personal criteria (values/goals/expertise)	☐	☐	☐	☐	☐
– economic criteria	☐	☐	☐	☐	☐
– financial considerations	☐	☐	☐	☐	☐
– social/ethical considerations	☐	☐	☐	☐	☐
– personal definition of a successful venture	☐	☐	☐	☐	☐
• Analysis of options available					
– management strategies	☐	☐	☐	☐	☐
– financing strategies	☐	☐	☐	☐	☐
– promotional strategies	☐	☐	☐	☐	☐
– vertical or horizontal expansion	☐	☐	☐	☐	☐
– diversification	☐	☐	☐	☐	☐
• Justify expansion decision					
– personal philosophy	☐	☐	☐	☐	☐
– plan for implementation	☐	☐	☐	☐	☐

FRAMEWORK FOR ASSESSING IMPLEMENTATION OF EXPANSION PLAN

E&I302-2

Date: _____

Student Name: _____

Project/Company Name: _____

Member(s) Name: _____

Module Learner Expectations

The student will:

- implement the expansion of a particular venture

STANDARD IS 3 IN EACH APPLICABLE AREA

Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Being Innovative					
• combine ideas or information in new ways	☐	☐	☐	☐	☐
• make connections between seemingly unrelated ideas	☐	☐	☐	☐	☐
• prepare, validate and implement plans that reveal new possibilities	☐	☐	☐	☐	☐
• shows creative thought in developing the expansion	☐	☐	☐	☐	☐
Ethics					
• encourage and support others to demonstrate ethical behaviour	☐	☐	☐	☐	☐
Managing Resources:					
• allocate human resources by assessing knowledge and skills and utilizing those skills effectively	☐	☐	☐	☐	☐
• distributing work and materials in an efficient manner	☐	☐	☐	☐	☐
• continually evaluate performance and make appropriate changes	☐	☐	☐	☐	☐
Teamwork, Leadership and Service					
• lead, when appropriate, mobilizing group for high performance	☐	☐	☐	☐	☐
Demonstrating Responsibility and Safety					
• work hard to excel at setting and meeting goals	☐	☐	☐	☐	☐
• shows creative thought in developing the expansion	☐	☐	☐	☐	☐
• sets high standards and pays attention to important details	☐	☐	☐	☐	☐
• able to assess the need for continued or future expansion	☐	☐	☐	☐	☐
Comments					

Date: _____

Student Name: _____

Module Learner Expectations
The student will:

- assess the elements of "success" (as personally defined) of the expanded venture

STANDARD IS 3 IN EACH APPLICABLE AREA
Rating Scale (*italics are optional*): *The student:*

4	exceeds defined outcomes. Plans and solves problems effectively and creatively in a self-directed manner. Tools, materials and/or processes are selected and used efficiently, effectively and with confidence. Quality, particularly details and finishes and productivity are consistent and exceed standards. <i>Leads others to contribute team goals. Analyzes and provides effective client/customer services beyond expectations.</i>
3	meets defined outcomes. Plans and solves problems in a self-directed manner. Tools, materials and/or processes are selected and used efficiently and effectively. Quality and productivity are consistent. <i>Works cooperatively and contributes ideas and suggestions that enhance team effort. Analyzes and provides effective client/customer services.</i>
2	meets defined outcomes. Plans and solves problems with limited assistance. Tools, materials and/or processes are selected and used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively to achieve team goals. Identifies and provides customer/client services.</i>
1	meets defined outcomes. Follows a guided plan of action. A limited range of tools, materials and/or processes are used appropriately. Quality and productivity are reasonably consistent. <i>Works cooperatively. Provides a limited range of customer/client services.</i>
0	has not completed defined outcomes. Tools, materials and/or processes are used inappropriately.

Criteria	Rating Scale				
	4	3	2	1	0
Oral Presentation					
Voice projection and enthusiasm/speed and pacing	☐	☐	☐	☐	☐
Body language	☐	☐	☐	☐	☐
Appearance	☐	☐	☐	☐	☐
Demonstrates knowledge of venture expansion	☐	☐	☐	☐	☐
Logical sequence in presentation	☐	☐	☐	☐	☐
Provides an introduction that describes the purpose and scope of the venture	☐	☐	☐	☐	☐
States a conclusion synthesizing information presented	☐	☐	☐	☐	☐
OR					
Technical Components (Written)					
Legible	☐	☐	☐	☐	☐
Free of spelling/proofreading errors	☐	☐	☐	☐	☐
Correct grammar/communication style	☐	☐	☐	☐	☐
Professional appearance/appropriate format	☐	☐	☐	☐	☐
Appropriate use of white spaces	☐	☐	☐	☐	☐
Page headings	☐	☐	☐	☐	☐
Line spacing	☐	☐	☐	☐	☐
Document free of smudges and wrinkles	☐	☐	☐	☐	☐
Contents					
Personal definition of 'success'	☐	☐	☐	☐	☐
Identification of expansion goals	☐	☐	☐	☐	☐
Set of criteria developed to assess expansion	☐	☐	☐	☐	☐
Application of criteria to own venture	☐	☐	☐	☐	☐
Interprets, organizes and combines information in creative and thoughtful ways	☐	☐	☐	☐	☐
Assesses and refines approach to expansion based on feedback and reflection	☐	☐	☐	☐	☐
Comments					

ENTERPRISE & INNOVATION

SECTION H: LINKAGES/TRANSITIONS

(INTERIM)

TABLE OF CONTENTS

This section of the GSI has been designed to provide an overview of linkages and transitions of CTS modules with a number of organizations. The charts and information presented in this section will assist CTS students and teachers in understanding the potential application of CTS modules as students move into the workplace.

LINKAGES

With Other CTS Strands.....	H.1
With Other Secondary Programs.....	H.3

TRANSITIONS

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To Related Post-secondary Programs.....	H.4

CREDENTIALLING	H.4
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Charts:

Enterprise and Innovation: Connections with Other CTS Strands	H.5
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Enterprise and Innovation: Connections Across the Curriculum	H.7
Enterprise and Innovation: Math Objective Match.....	H.8

Enterprise and Innovation: Summary of Related Post-secondary Programs ...	H.10
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LINKAGES/TRANSITIONS

LINKAGES

With Other CTS Strands

In Enterprise and Innovation, students have the opportunity to develop and implement venture plans. These venture plans could be community-, public-service or profit-related.

Students are encouraged to link the competencies they have developed through past experiences, hobbies and interests with and between core and complementary courses. Linkages between Enterprise and Innovation and other programs will vary according to the type and sophistication of the venture. The following charts outline potential linkages.

Strand	Module
Agriculture	Field, Nursery and Greenhouse Crops I Livestock, Poultry and Animal Specialties I Landscape and Turf Management I Pets and Equine I Floral Design I
Career Transitions	Project modules
Communication Technology	Presentation and Communication I Photography modules Audio/Video modules Photojournalism Printing modules
Construction Technologies	Recycling Materials Finishing and Refinishing Manufacturing Systems Furniture Making modules Cabinetry modules Product Development Production Planning and Tooling Production Management
Cosmetology Studies	Hair and Scalp Care modules Skin Care Haircutting Male Facial Grooming Manicuring Theatrical Makeup
Design Studies	The Design Process Design—Applications modules Portfolio Presentation
Electro-Technologies	Repair/Maintenance
Energy and Mines	Fundamentals of Recycling

Strand	Module
Fabrication Studies	Exploring Production Systems Custom Fabrication Prefabrication Principles
Fashion Studies	Repair and Recycle Activewear Sewing for Others Upholstery
Financial Management	Establishing an Accounting System for a Service Business Establishing an Accounting System for a Merchandising Business Financial Statements
Foods	Food Safety and Sanitation Food Venture Creative Food Presentation Entertaining with Food The Food Entrepreneur
Forestry	Making a Difference in Forestry The Forest Marketplace
Information Processing	Keyboarding Word Processing Graphics Tools Spreadsheet Correspondence Reports Tables/Forms Document Production
Legal Studies	Labour Law Environmental Law Laws Affecting Small Business
Management and Marketing	All modules
Mechanics	Vehicle Service and Care Vehicle Detailing Vehicle Maintenance Basic Touch-up and Finishing Interior Finishes and Repairs Glass Removal and Installation
Tourism	Tourism Food Sector Tourism Accommodation Sector Tourism Travel Sector Tourism Attractions Sector
Wildlife	Outdoor Experiences Making a Difference to Wildlife

Following are a few examples of possible module groupings into sample courses. Although there are only eight Enterprise and

Innovation modules, it is possible to offer a 10-credit or 15-credit course by “importing” modules from the other CTS strands.

Enterprise and Innovation Sample Courses

	3-credit (No previous experience)	3-credit (Previous experience plus one of choice)	5-credit (Plus two of choice)	8-credit	10-credit (Plus two modules from other CTS strands ★)	15-credit (Plus seven modules from other CTS strands ★)
Challenge and Opportunity	✓		✓	✓	✓	✓
Planning a Venture	✓		✓	✓	✓	✓
Analyzing Ventures				✓	✓	✓
Financing Ventures		✓		✓	✓	✓
Marketing the Venture				✓	✓	✓
Making It Happen	✓	✓	✓	✓	✓	✓
Managing the Venture				✓	✓	✓
Expanding the Venture				✓	✓	✓

Potential linkages of Enterprise and Innovation with other CTS strands, determined by course emphasis and area of specialization, are identified in this section (see “Enterprise and Innovation: Connections with Other CTS Strands”, page H.5 and “Enterprise and Innovation in Junior High”, page H.6)

With Other Secondary Programs

Enterprise and Innovation has linkages with Mathematics, Language Arts, Economics and Social Studies. Depending on the venture selected, there may be linkages with other courses. Potential linkages of Enterprise and Innovation with other core and complementary subject areas across the curriculum are identified in this section (see “Enterprise and Innovation: Connections Across the Curriculum”, page H.7, and “Enterprise and Innovation: Math Objective Match”, pages H.8-9).

TRANSITIONS

To the Workplace

All modules are designed to provide students with the knowledge, skills and attitudes that are required in the workplace, whether as a volunteer, an employer or an employee. Enterprise and Innovation may be offered in any context and therefore may articulate with any occupational area.

To Related Post-secondary Programs

The nature of Enterprise and Innovation provides the flexibility for students to undertake ventures of personal significance. As a result, Enterprise and Innovation may be offered in any context and therefore may articulate with any occupational area; e.g., Agriculture, Construction Technologies, Cosmetology, Tourism Studies, Foods. There is also articulation with business-related programs; e.g., Management and Marketing, Financial Management and Legal Studies. For specific post-secondary programs, refer to this section for the appropriate strand.

An outline of post-secondary institutions in Alberta currently offering programs in enterprise- and innovation-related areas is provided in this section (see “Enterprise and Innovation: Summary of Related Post-secondary Programs”, page H.10).

CREDENTIALLING

No opportunities for credentialling are available in the Enterprise and Innovation Strand.

LINKAGES – Enterprise and Innovation: Connections with Other CTS Strands

Enterprise and Innovation Modules	Other CTS Strands																		
	Agriculture	Career Transitions	Communication Technology	Community Health	Construction Technologies	Cosmetology Studies	Design Studies	Electro Technologies	Energy and Mines	Fabrication Studies	Fashion Studies	Foods	Financial Management	Forestry	Information Processing	Legal Studies	Logistics	Management and Marketing	Mechanics
Theme: Getting the Idea																			
E&I101: Challenge & Opportunity																			
Theme: Preparing for Action																			
E&I102: Planning a Venture																			
E&I201: Analyzing Ventures																			
E&I202: Financing Ventures																			
Theme: Making It Happen																			
E&I203: Marketing the Venture																			
E&I204: Making It Happen																			
E&I301: Managing the Venture																			
E&I302: Expanding the Venture																			

Provides many direct links with competencies in this strand. Students will reinforce, extend and apply a substantial number of knowledge and/or skill components in practical situations.



Provides some links with competencies developed in this strand, usually through the application of related technologies and/or processes.



LINKAGES – *Enterprise and Innovation in Junior High*

<u>Course Emphasis</u>	<u>Enterprise & Innovation Modules</u>	<u>Management & Marketing Modules</u>
Leadership (3 modules)	Challenge & Opportunity	Management & Marketing Basics
	Planning a Venture	
Making It Happen (4 modules)	Challenge & Opportunity	Quality Customer Service
	Planning a Venture	
	Making It Happen	

LINKAGES – Enterprise and Innovation: Connections Across the Curriculum

Enterprise and Innovation Modules	Across the Curriculum																			
	Junior High							Senior High												
	Language Arts	Social Studies	Mathematics	Science	Health & PLS	Physical Education	Fine Arts	English	Social Studies	Mathematics	Science (General)	Biology	Chemistry	Physics	CALM	Physical Education	Fine Arts	Social Sciences	Second Language	
Theme: Getting the Idea																				
E&I101: Challenge & Opportunity																				
Theme: Preparing for Action																				
E&I102: Planning a Venture																				
E&I201: Analyzing Ventures																				
E&I202: Financing Ventures																				
Theme: Making It Happen																				
E&I203: Marketing the Venture																				
E&I204: Making It Happen																				
E&I301: Managing the Venture																				
E&I302: Expanding the Venture																				

Provides many direct links with content in this strand. Students will reinforce, extend and apply a substantial number of knowledge and/or skill components in practical situations.



Provides some links with competencies developed in this strand, usually through the application of related technologies and/or processes.



LINKAGES – Enterprise and Innovation: Math Objective Match

CAREER & TECHNOLOGY STUDIES		MATH			ACTIVITY
Module	Objective/Concept	Course	Unit	Concept/Skill	
E&I101	Planning a venture Assessing a venture	Math 9	Data Management	Analyze and interpret statistical information and graphs	Analyze financial statements when purchasing a franchise.
E&I102	Analyzing markets	Math 9	- Data Management - Problem Solving	Interpret graphs	Plot sales of a given product over a period of time.
E&I202	Equity capital	Math 14	Problem Solving	Banking	Examine the pros and cons of various sources of equity capital.
E&I202	Debt financing	Math 14	Problem Solving	Banking	Examine the pros and cons of debt financing.
E&I202	Cash flow	Math 9	- Problem Solving - Data Management - Equations - Number Systems	Apply and practice problem-solving skills, using estimating skills and performing computations	Prepare a sample cash flow showing cash flow for a period of time.
E&I203	Targeting the market	Math 9	- Problem Solving - Data Management - Statistics	Apply and practice problem-solving skills Interpreting data, charts and graphs	Determine the number of potential customers in a marketing area.

LINKAGES – Enterprise and Innovation: Math Objective Match (continued)

CAREER & TECHNOLOGY STUDIES		MATH			ACTIVITY
Module	Objective/Concept	Course	Unit	Concept/Skill	
E&I204	Marketing the venture	Math 9	Problem Solving	Breaking the problem into smaller parts	Calculate selling prices of a product given sales, advertising, distribution costs.
E&I204	Financing the venture	Math 9	Problem Solving	Working backward	Given production, marketing costs, prepare a budget for a new business.
E&I204	Producing/servicing	Math 9	Problem Solving	Collect and organize information	Determine quality control tolerances on a production line.
E&I301	Planning	Math 9	- Number Systems - Data Management - Equations	Whole numbers	Given data, calculate a monthly statement.
E&I301	Managing finances	Math 9	- Number Systems - Operations	Rational numbers	Complete a sample payroll with deductions.
E&I302	Expanding the venture	Math 9	Problem Solving	1. Understanding problems 2. Developing a plan 3. Carrying out the plan 4. Looking back	Given the cost of expansion, calculate the gross sales required to make the venture profitable.

TRANSITIONS – Enterprise and Innovation: Summary of Related Post-secondary Programs

	PUBLIC COLLEGES										APPRENTICESHIP TRADE		PRIVATE COLLEGES					TECH. INST.		Banff	UNIVERSITIES				VOCATIONAL COLLEGES						
	Alberta College of Art & Design	Fairview College	Grande Prairie Regional College	Grant MacEwan Community College	Keyano College	Lakeland College	Leithbridge Community College	Medicine Hat College	Mount Royal College	Olds College	Red Deer College	Alberta College	Augustana University College	Canadian Union College	Concordia College	King's University College, The	North American Baptist College	Northern Alberta Institute of Technology	Southern Alberta Institute of Technology	Banff Centre	Athabasca University	University of Alberta	University of Calgary	University of Lethbridge	AVC - Calgary	AVC - Edmonton	AVC - Lac La Biche	AVC - Lesser Slave Lake			
Administration (including Employee Benefits Planning, Hotel Restaurant, Human Resource Management & Organizational Studies, Insurance, Labour Relations, Local Government, Personnel, Public and Senior Executive Fellows)			CD	CD			CD											VC	CD	V	CB(3y)B (4y)	VCD M	C	CB M							
			2t	2t	2t	1t	V	12t	2t	2t	2t												BMP hD	BMP hD							
		CD	CD	CD	C	CD	D	CD	CD	D	CD	D (10m)						D	CD					C			C1t C				
			D	CD		D	CD	D2t	D2t	CD	C2t							VC D	CD	V	B	C	C	CD	V					C	
Business Administration		CD	CD	CD	C	CD	D	CD	CD	CD	D (10m)							D	CD					C				C1t C			
Management (including certificate & diploma programs in Agricultural, Business Enterprises & Self-Governing Systems of Indian, Inuit & Metis People, etc.)	D	D	D	CD		D	CD	D2t	D2t	CD	C2t							VC D	CD	V	B	C	C	CD	V						C

CODES:	B	Bachelor's Degree	D	Diploma (2 years)	w	weeks
	M	Master's Degree	V	Varies	m	months
	Ph.D.	Doctoral Degree	1t	One-year transfer	y	years
	C	Certificate (1 year or less)	2t	Two-year transfer		

*Information taken from "It's About Time: To Start Thinking About Your Future", Advanced Education and Career Development, 1995.

ENTERPRISE AND INNOVATION

SECTION I: LEARNING RESOURCE GUIDE

(INTERIM)

TABLE OF CONTENTS

This section of the GSI has been designed to provide a list of resources that support student learning. Three different types of resources are identified:

- Authorized: Resources authorized by Alberta Education for CTS curriculum; these resources are categorized as basic, support, or teaching
- Other: Titles provided as a service to assist local jurisdictions to identify resources that contain potentially useful ideas for teachers. Alberta Education has done a preliminary review of these resources, but further review will be necessary for use in school jurisdictions
- Additional: A list of local and provincial sources of information available to teachers, including the community, government agencies, resource centres and organizations.

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CTS and the Resource-Based Classroom	I.1
Purpose and Organization of this Document	I.1
How to Order	I.2
Resource Policy	I.2
AUTHORIZED RESOURCES	I.3
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INTRODUCTION

CTS AND THE RESOURCE-BASED CLASSROOM

Career and Technology Studies (CTS) encourages teachers to establish a resource-based classroom, where a variety of appropriate, up-to-date print and non-print resources are available. Learning resources identified for CTS strands include print, software, interactive videos, manipulatives, student learning guides and tutorials.

The resource-based classroom approach accommodates a variety of instructional strategies and teaching styles, and supports individual or small group program planning. It provides students with opportunities to interact with a wide range of information sources in a variety of learning situations. Students in CTS are encouraged to take an active role in managing their own learning. Ready access to a strong resource base enables students to learn to screen and use information appropriately to solve problems, to meet their specific classroom and learning needs, and to develop competency in reading, writing, speaking, listening and viewing.

PURPOSE AND ORGANIZATION OF THIS DOCUMENT

The purpose of this document is to help teachers identify a variety of resources to meet their needs and those of the students taking the new Enterprise and Innovation curriculum. It is hoped that this practical guide to resources will help teachers develop a useful, accessible resource centre that will encourage students to become independent, creative thinkers.

This document is organized as follows:

- Authorized Resources
 - basic, support and teaching resources
- Other Resources
- Additional Sources.

Some resources in the list have been authorized for use in some or all of the CTS strands; e.g., the 11-video Career and Technology Studies series produced by ACCESS: The Education Station. Full information is provided in the appropriate section of this resource guide.

Each resource in the list provides bibliographic information, an annotation where appropriate, and a correlation to Enterprise and Innovation modules. The distributor code for each entry will facilitate ordering resources. It is recommended that teachers preview all resources before purchasing, or purchase one copy for their reference and additional copies as required.

Distributor
Code - see
Distributor
Directory

Distributor Code	Resources		Levels/Mod. No.			Indicates module number
			1	2	3	
LRDC	Title	Author	101	201	301	
	Bibliographic Information					
	Annotation					

HOW TO ORDER

Most authorized resources are available from the Learning Resources Distributing Centre (LRDC) at:

12360 – 142 Street
Edmonton, AB
T5L 4X9
Telephone: (403) 427–2767
Fax: (403) 422–9750

Please check LRDC for availability of videos.

The section on Additional Sources lists a variety of other places to find information related to this strand. In addition, at the back of this document is a Distributor Directory, which contains the name and address of each publisher/distributor referred to in the resource list. Note that in some cases a resource may be published by one company but distributed through another.

The information contained is as complete and accurate as possible.

RESOURCE POLICY

For further information on resource policy and definitions, refer to the *Student Learning Resources Policy* and *Teaching Resources Policy* or contact:

Learning Resources Unit
Curriculum Standards Branch
Alberta Education
5th Floor, Devonian Building, East Tower
11160 Jasper Avenue
Edmonton, AB
T5K 0L2
Telephone: (403) 422–4872
Fax: (403) 422–0576

AUTHORIZED RESOURCES

BASIC LEARNING RESOURCES

The following basic learning, student support and teaching resources have been authorized by Alberta Education for use in the Enterprise and Innovation curriculum. A curriculum correlation appears in the right-hand column.

Distributor Code	Resources	Levels/Module No.		
		1	2	3
LRDC	<i>All That Glitters</i>. Rexdale, ON: McIntyre Media Ltd., 1990. Videotape. In this 30-minute video, a high school economics class receives a first-hand lesson about the problems of running a business when the teacher sets up a class project. It is a great success until greed and ambition "at the top" destroy the morale of the workers, the quality of the project and the ethical behaviour of its leaders.	101 102	201 202 203 204	301 302
LRDC	<i>Entrepreneurial Spirit, The</i>. Michael Liepner, Herve De Jordy and Michael Schultz. Scarborough, ON: McGraw-Hill Ryerson Limited, 1991. The textbook exposes students to entrepreneurs and entrepreneurship. Many of the case studies and profiles provide insight into the skills, strengths and weaknesses displayed by entrepreneurs, such as perseverance, goal setting, persistence and confidence. It also provides insight into some of the entrepreneurial opportunities available in Canada and how to pursue them. A teacher's resource manual is available.	101 102	201 202 203 204	301 302
LRDC	<i>Entrepreneurship: Creating a Venture</i>. M. Lily Kretchman, Lori Cranson and Bill Jennings. Toronto, ON: John Wiley and Sons, 1991. The basic premise of this publication is that entrepreneurial attributes can be acquired and improved in a school setting. Young people are led through a variety of business principles in creating, planning and preparing to launch their own ventures, whether a venture is for profit or not-for-profit. They are also provided with an opportunity to learn about themselves, set personal goals and develop entrepreneurial skills. All chapter activities and applications have been designed to encourage students to scan a wide range of alternatives, think creatively and critically, assess priorities and be creative in posing solutions to problems. A teacher's resource package is available.	101 102	201 202 203 204	301 302

Basic Learning Resources (continued)

Distributor Code	Resources	Levels/Module No.		
		1	2	3
ACC	<i>Entrepreneurship: The Spirit of Adventure</i>. R.W. Bodell, Gary W. Rabbior and Larry W. Smith. Toronto, ON: Harcourt Brace Jovanovich Canada Inc., 1991. The textbook explores what entrepreneurs have accomplished and what has motivated them to achieve their objectives. Five major units cover what an entrepreneur is, innovation and entrepreneurship, opportunities and ideas, entrepreneurial planning and entrepreneurial skills within organization. Individual chapters include key concepts; attitudes, skills and abilities; profiles; and case studies. A teacher's guide is available.	101 102	201 202 203 204	301 302
LRDC	<i>Entrepreneurship for Canadians: The Spirit of Adventure</i>. Toronto, ON: Canadian Foundation for Economic Education, 1990/1992. Videotapes. Series of six videos profiling Canadian entrepreneurs. One teacher inservice video. The user's guide provides suggested teaching strategies. A teacher's guide is available.	101 102	201 202 203 204	301 302
ITF	<i>Paradigms: Joe Barker's "Discovering the Future"</i>. (Expanded second edition.) Joe Barker. Toronto, ON: International Telefilm. Videotape with Discussion Guide. "Paradigms" (rules we take for granted) may become so deeply rooted, so unquestioned, that they can become barriers to our ability to see new opportunities. This 38-minute video explains the implications of paradigms and future success.	101 102	201 202 203 204	301 302
CBA	<i>Planning for Success: An Interactive Learning Adventure</i> (DOS Version.) Toronto, ON: Canadian Bankers Association, 1994. CD-ROM, Three Video Programs. <i>Planning for Success</i> is a multimedia teaching resource package consisting of three video programs directed at 12-14 year olds, 15-17 year olds and 18 years old and over. The CD-ROM features "The Enterprise Centre" and related print support material. There are dozens of interactive lessons, animated games, brainteasers and financial planning exercises. Numerous Canadian entrepreneurs are included in the video segments. Students can prepare and print out their own complete venture plans. Recommended requirements: 486DX/33 computer/mouse; Microsoft® Windows™ 3.1; 8 megabytes of RAM; 640x480 SVGA 256 colour display; 16 bit Windows compatible sound board and speakers; doublespeed (300 kb/sec) CD-ROM drive. The distributor notes that the CD-ROM will run slowly on anything less than the above Windows multimedia platform. Planning for Success is available in French "Planifiez Votre Succès"; an aboriginal version "The Spirit Lives: Aboriginal Entrepreneurs in Canada" is available. A user's guide is available.	101 102	201 202 203 204	301 302

SUPPORT LEARNING RESOURCES

The following support learning resources are authorized by Alberta Education to assist in addressing some of the learner expectations of a module or components of modules.

Distribut or Code	Resources	Levels/Module No.		
		1	2	3
ACC	<i>Career and Technology Studies: Key Concepts</i> . Edmonton, AB: ACCESS: The Education Station. Series of videos and utilization guides relevant to all CTS strands. Series consists of <i>Anatomy of a Plan, Creativity, Electronic Communication, The Ethics Jungle, Go Figure, Innovation, Making Ethical Decisions, Portfolios, Project Planning, Responsibility and Technical Writing</i> .	101	201	301
		102	202	302
			203	
			204	
LRDC	<i>Hat Tricks (W5)</i> . CTV Program & Archive Sales, 1990. Videocassette. This six minute W5 program introduces Alex Tilley, a Canadian Entrepreneur who has become famous for his "Tilley Hat".	101	201	301
		102	202	302
			203	
			204	

TEACHING RESOURCES

The following teaching resources are authorized by Alberta Education to assist teachers in the instructional process.

Distributor Code	Resources	Levels/Module No.		
		1	2	3
LRDC	<i>Creativity in Business: An Entrepreneurial Approach.</i> Gene Luczkiw and Kenneth E. Loucks. Toronto, ON: Copp Clark Pitman Ltd., 1992. Student/Teacher Package. A highly practical, hands-on approach that includes case studies, questionnaires and activities, all in a three-ring binder format. Provides a solid base for developing an understanding and appreciation of entrepreneurship and the entrepreneurial process.	101	201	301
		102	203 204	302
LRDC	<i>Entrepreneurial Spirit, The.</i> Michael Liepner, Herve De Jordy and Michael Schultz. Scarborough, ON: McGraw-Hill Ryerson Limited, 1991. Teacher Resource's Manual. See Basic Learning Resources for module correlation and annotation.			
LRDC	<i>Entrepreneurship: Creating a Venture.</i> M. Lily Kretchman, Lori Cranson and Bill Jennings. Toronto, ON: John Wiley and Sons, 1991. Teacher's Resource Package. See Basic Learning Resources for module correlation and annotation.			
LRDC	<i>Entrepreneurship: The Spirit of Adventure.</i> R.W. Bodell, Gary W. Rabbior and Larry W. Smith. Toronto, ON: Harcourt Brace Jovanovich Canada Inc., 1991. Teacher's Guide. See Basic Learning Resources for module correlation and annotation.			
LRDC	<i>Entrepreneurship for Canadians: The Spirit of Adventure.</i> Toronto, ON: Canadian Foundation for Economic Education, 1990/1992. Teacher's Guide. See Basic Learning Resources for module correlation and annotation.			
CBA	<i>Planning for Success: An Interactive Learning Adventure</i> (DOS Version.) Toronto, ON: Canadian Bankers Association, 1994. User's Guide. See Basic Learning Resources for module correlation and annotation.			

ENTERPRISE AND INNOVATION RESOURCES

THEME CODE:

- A. Getting the Idea
B. Preparing for Action
C. Making It Happen

FORMAT CODE:

- p* - Print
v - Video
s - Software

STATUS CODE:

- B* - Basic
S - Support
T - Teaching

LEVEL CODE:

- 1 - Introductory
2 - Intermediate
3 - Advanced

JR/SR HIGH CODE:

- J - Junior High
S - Senior High

LEVEL				1	1	2	2	2	2	3	3
THEME				A	B	B	B	C	C	C	C
Title of Resource	<i>Format</i>	<i>Status</i>	<i>Junior/Senior High</i>	Challenge and Opportunity	Planning A Venture	Analyzing Ventures	Financing Ventures	Marketing the Venture	Making It Happen	Managing the Venture	Expanding the Venture
				101	102	201	202	203	204	301	302
All That Glitters - Video	<i>v</i>	<i>B</i>	J/S	X	X	X	X	X	X	X	X
Entrepreneurial Spirit				X	X	X	X	X	X	X	X
Text	<i>p</i>	<i>B</i>	J/S								
Teacher's Resource Manual	<i>p</i>	<i>T</i>	J/S								
Entrepreneurship: Creating A Venture				X	X	X	X	X	X	X	X
Text	<i>p</i>	<i>B</i>	J/S								
Teacher's Resource Package	<i>p</i>	<i>T</i>	J/S								
Entrepreneurship: The Spirit of Adventure				X	X	X	X	X	X	X	X
Text	<i>p</i>	<i>B</i>	J/S								
Teacher's Guide	<i>p</i>	<i>T</i>	J/S								
Entrepreneurship for Canadians: The Spirit of Adventure				X	X	X	X	X	X	X	X
Videotapes	<i>v</i>	<i>B</i>	J/S								
Teacher's Guide	<i>p</i>	<i>T</i>	J/S								
Paradigms: Joe Barker's "Discovering the Future"	<i>v</i>	<i>B</i>	J/S	X	X	X	X	X	X	X	X
Planning For Success: An Interactive Learning Adventure				X	X	X	X	X	X	X	X
3 Videotapes	<i>v</i>	<i>B</i>	J/S								
CD-ROM	<i>s</i>	<i>B</i>	J/S								
User's Guide	<i>p</i>	<i>T</i>	J/S								
Career and Technology Studies: Key Concepts				X	X	X	X	X	X	X	X
Videotapes	<i>v</i>	<i>S</i>	J/S								
Utilization Guides	<i>p</i>	<i>S</i>	J/S								
Hat Tricks (W5)	<i>v</i>	<i>S</i>	J/S	X	X	X	X	X	X	X	X
Creativity in Business: An Entrepreneurial Approach				X	X	X	X	X	X	X	X
Student/Teacher Package	<i>p</i>	<i>T</i>	J/S								

ADDITIONAL SOURCES

Available to Enterprise and Innovation teachers, both locally and provincially, are many resources that can be used to enhance Career and Technology Studies courses. These sources are available through the community, government agencies, resource centres and organizations. Some of these sources, e.g., government departments, undergo frequent name and/or telephone number changes. Please check your telephone directory or an appropriate government directory.

The following is a partial list of sources in the community to consider:

TEACHER-LIBRARIANS

Planned and purposeful use of library resources helps students grow in their ability to gather, process and share information. Research activities require access to an adequate quantity and variety of appropriate, up-to-date print and non-print resources from the school library, other libraries, the community and additional sources. Some techniques to consider are:

- planning together
- establishing specific objectives
- integrating research skills into planning.
- integrating research skills into planning.

Cooperation between the teacher-librarian and the subject area teacher in the development of effectively planned resource-based research activities ensures that students are taught the research skills as well as the subject content. Also see *Focus on Research: A Guide to Developing Students' Research Skills* referenced in the Alberta Education Sources section.

ALBERTA EDUCATION SOURCES

Related Documents

The following monographs are available for purchase from:

Learning Resources Distributing Centre
12360 – 142 Street
Edmonton, AB
T5L 4X9
Telephone: 427-2767
Fax: 422-9750

Please consult the "Support Documents" section or the "Legal, Service and Information Publications" section in the *Buyers Guide* for ordering information and costs.

Developmental Framework Documents

- *The Emerging Student: Relationships Among the Cognitive, Social and Physical Domains of Development*, 1991

This document looks at the whole child, or student, as a productive learner, integrating all the domains of development—cognitive, social and physical. It emphasizes the need for providing balanced curriculum and instruction.

- *Students' Interactions Developmental Framework: The Social Sphere*, 1988

This document examines children's normal physical growth in three areas: perceptual, structural and motor development. In none of these areas is the child's growth a single continuous curve throughout the first two decades of life. Physical growth is characterized by periods of rapid growth and periods of slower growth. Consequently, differences and changes in growth patterns may affect the timing of certain learning processes.

- *Students' Thinking: Developmental Framework Cognitive Domain*, 1987

This document explores children's cognitive development from infancy to adolescence. The Piagetian stages of pre-operational, concrete operational and formal operational thinking are explained. Suggestions for improving the learning process are also presented.

Others

- *Focus on Research: A Guide to Developing Students' Research Skills*, 1990

This document outlines a resource-based research model that helps students manage information efficiently and effectively, and in this process, to gain skills that are transferable to all school and work situations. The model provides a developmental approach to teaching students how to do research.

- *Teaching Thinking: Enhancing Learning*, 1990

Principles and guidelines for cultivating thinking, ECS to Grade 12, have been developed in this resource. It offers a definition of thinking, describes nine basic principles on which the suggested practices are based, and discusses possible procedures for implementation in schools and classrooms.

OTHER GOVERNMENT SOURCES

ACCESS: The Education Station

ACCESS: The Education Station offers a variety of resources and services to teachers. For a nominal dubbing and tape fee, teachers may have ACCESS: The Education Station audio and video library tapes copied.

ACCESS: The Education Station publishes listings of audio and video cassettes as well as a comprehensive programming schedule.

Of particular interest are the Career and Technology Studies videos that are available with teacher utilization guides. The guides outline key points in each video and suggest questions for discussion, classroom projects and other activities. Video topics are listed in the Authorized Resources section of this Guide. Videos and accompanying support material can be obtained from:

ACCESS: The Education Station
3720-76 Avenue
Edmonton, AB
T5B 2N9
Telephone: 440-7777 (in Edmonton)
Telephone: 1-800-352-8293
(outside Edmonton)

Alberta Advanced Education and Career Development

Information Development and Marketing
9th Floor, City Centre Building
10155 - 102 Street
Edmonton, AB
T5J 4L5
Telephone: 422-1794
Fax: 422-5126
Career Information Catalogue Update, 1994
The Career Planner
Children Challenges Choice
Entrepreneur: A Big Word for Small Business
Positive Works
Rural Women as Business Entrepreneurs
Skills Are Your Passport

Videos on entrepreneurial topics and career planning are available through the library of this department. Call 422-4752 for more information. The following videos are representative of the library's holdings:

The Entrepreneur [video]
Get a Job [video]
A Head for Business [video]
The Seven Phases of a Job Interview [video]

Alberta Economic Development and Tourism

Strategic Planning and Research
9th Floor, Sterling Place
9940 - 106 Street
Edmonton, AB
T5K 2P6
Telephone: 422-9494
Fax: 422-5922
Financing a Small Business
Marketing a Small Business
Starting a Small Business

Alberta Human Rights Commission

805, 10808 - 99 Avenue
Edmonton, AB
T5K 0G5
Telephone: 427-3116
Fax: 422-3563

Main Floor, Dorchester Square
102, 1333 - 8 Street SW
Calgary, AB
T2R 1M6
Telephone: 297-6571
Fax: 297-6567
Individual's Rights Protection Act

Alberta Labour

9940 - 106 Street

Edmonton, AB

T5K 2N2

Telephone: 427-8848

Employment Standards Code [teacher resource package]

Offices in are also in Calgary, Camrose, Edson, Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat, Red Deer, Vermilion.

Alberta Women's Secretariat

8th Floor, Kensington Place

10011 - 109 Street

Edmonton, AB

T5J 3S8

Telephone: 422-4927

Stepping Stones Teacher's Kit [distributed to every school in Alberta in care of the school counsellor]

Canadian Broadcasting Corporation

CBC Education Sales

P.O. Box 500 Stn A

Toronto, ON M5W 1E6

Telephone: (416) 205-6384

Fax: (416) 205-3482

- Venture Series
- Market Place Series

Federal/Provincial Consumer Education and Plain Language Task Force

c/o Manitoba Textbook Bureau

277 Hutchings Street

Winnipeg, MB

R2X 2R4

Project Real World: Economic Living Skills for High School Students

National Film Board of Canada (NFB)

The NFB has numerous films and videotapes that may be suitable for Enterprise and Innovation. For a list of NFB films and videotapes indexed by title, subject and director, or for rental or purchase of NFB films and videotapes, call 1-800-267-7710 (toll-free).

Educational Marketing Officers in Calgary and Edmonton are available, province wide, for workshops, conferences, professional development days and similar activities. For northern Alberta and the Northwest Territories, the Educational Marketing Officer can be reached at 495-3012 (fax, 495-6412). For southern

Alberta, contact the Educational Marketing Officer at 292-5411 (fax, 292-5458).

ACCESS: The Education Station and some school boards have acquired duplication rights to some NFB videotapes. Please consult the relevant catalogues in your school or school district.

The Calgary Public Library has a selection of NFB films and videotapes that can be borrowed free of charge with a Calgary Public Library borrower's card. For further information, contact:

Calgary Public Library

Films and Recordings Department

616 Macleod Trail SE

Calgary, AB

T2G 2M2

Telephone: 260-2650

Fax: 292-5458

Resource Centres***Urban Resource Centres***

Calgary Board of Education

Supervisor, Education Media

3610 - 9 Street SE

Calgary, AB

T2G 3C5

Telephone: 294-8540

Fax: 287-9739

Calgary Separate School Board

Supervisor, Instructional Materials

1000 - 5 Avenue SW

Calgary, AB

T2P 4T9

Telephone: 246-6663

Fax: 249-3054

County of Strathcona

Director, Learning Resource Service

2001 Sherwood Drive

Sherwood Park, AB

T8A 3W7

Edmonton Public School Board
Learning Resource Consultant
Centre for Education
One Kingsway Avenue
Edmonton, AB
T5H 4G9
Telephone: 429-8320
Fax: 429-8318

Lakeland School District No. 5460
Area Superintendent
Postal Bag 1001
6005 – 50 Avenue
Bonnyville, AB
T9N 2L4
Telephone: 826-3145
Fax: 826-4600

Medicine Hat School District No. 76
IMC Manager
601 – 1 Avenue SW
Medicine Hat, AB
T1A 4Y7
Telephone: 526-1323
Fax: 529-5339

Red Deer Public School Board
Coordinator of Instruction
4747 – 53 Street
Red Deer, AB
T4N 2E6
Telephone: 343-1405
Fax: 347-8190

St. Anthony's Teacher Centre
Supervisor, Curricular Resources
10425 – 84 Avenue
Edmonton, AB T6E 2H3
Telephone: 439-7356
Fax: 433-0181

Regional Resource Centres

Zone I

Zone I Regional Resource Centre
Film Supervisor
10020 – 101 Street
P.O. Box 6536
Peace River, AB
T8S 1S3
Telephone: 624-3187
Fax: 624-5941

Zones II and III

Central Alberta Media Services (CAMS) Film
Supervisor
182 Sioux Road
Sherwood Park, AB
T8A 3K5
Telephone: 464-5540
Fax: 467-5469

Zone IV

Alberta Central Regional Education Services
(ACRES)
Operations Manager
County of Lacombe
Parkland Regional Library Building
56 Avenue and 53 Street Corner
Box 3220
Lacombe, AB
T0C 1S0
Telephone: 782-5730
Fax: 782-5831

Zone V

South Central Alberta Resource Centre
(SCARC) c/o County of Wheatland
435 B Hwy #1
Strathmore, AB
T1P 1J4
Telephone: 934-5028
Fax: 934-4889

Zone VI

Southern Alberta Learning Resource Centre
(SALRC)
Film Supervisor
Provincial Government Administration
Building
120, 909 Third Avenue North
Box 845
Lethbridge, AB
T1J 3Z8
Telephone: 320-7807
Fax: 320-7817

Statistics Canada

Regional Office
8th Floor, Park Square
10001 Bellamy Hill
Edmonton, AB
T5J 3B6
Telephone: 495-3023
Fax: 495-5318

Canadian Social Trends
Metropolitan Edmonton, Metropolitan Calgary, etc.

ASSOCIATIONS/ORGANIZATIONS**Alberta Debate and Speech Association**

202, 17308 – 108 Avenue
Edmonton, AB
T5X 3Y8
Telephone: 484-7929
Fax: 484-2710

Alberta Foundation for Economic Education

901, 10179 – 105 Street
Edmonton, AB
T5J 1E2
Telephone: 421-9331
Fax: 426-2987

The Chartered Banks and Canada's Economy
Labour in the Canadian Economy [teacher resource]
Retail Marketing in Canada
Using Money Wisely

Bank of Montreal

Communications Assistant
Public Affairs
P.O. Box 6002
Place d'Armes
Montreal, PQ
H2Y 3S8
Telephone: (514) 555-1212

Money and Banking Modules [teacher resource—
duplication permission granted when used by
schools]

Canadian Advertising Foundation

402, 350 Bloor Street East
Toronto, ON
M4W 1H5
Telephone: (416) 961-6311

Canadian Advisory Council on the Status of Women

9th Floor, 110 O'Connor Street
Ottawa, ON
K1P 5M9
Telephone: (613) 992-4975
Fax: (613) 992-1715

Teacher Resources

Canadian Job Strategy 1987
Pay Equity
Planning Our Future
Women Entrepreneurs

Canadian Bankers Association

600, The Exchange Tower
P.O. Box 348
2 First Canadian Place
Toronto, ON
M5X 1E1
Telephone: (416) 362-6092
Fax: (416) 362-7705

Financing a Small Business: Working with Your Bank
Helping You Bank
Starting a Small Business

The Canadian Chamber of Commerce

1160, 55 Metcalfe Street
Ottawa, ON
K1P 6N4
Telephone: (613) 238-4000
Fax: (613) 238-7643

Canadian Co-operative Association

400, 275 Bank Street
Ottawa, ON
K2P 2L6

*Co-operative Entrepreneurship: A Case Study in Worker
Ownership*

Canadian Foundation for Economic Education

501, 2 St. Clair Avenue West
Toronto, ON
M4V 1L5
Telephone: (416) 968-2236
Fax: (416) 968-0488

*BIZBALL: A Look at Basic Business and Economics
Concepts Via Major League Baseball*

Entrepreneurship: A Primer for Canadians [teacher resource]

Labour Market: Teacher's Resource Package [teacher resource]

Money and Youth

Women in the Work Force

Canadian Imperial Bank of Commerce

Commerce Court
Toronto, ON
M5L 1A2
Telephone: (416) 980-2211
Fax: (416) 861-3666

The Canadian Manufacturers Association

102, 130 Albert Street
Ottawa, ON
K1P 5G4
Telephone: (613) 233-8423
Fax: (613) 233-6048

The Conference Board of Canada

255 Smyth Road
Ottawa, ON
K1H 8M7
Telephone: (613) 526-3280
Fax: (613) 526-4857

Economic Forecast: Provincial Outlook [research reports, personalized information services]

The Edmonton Journal

10006 – 101 Street
Edmonton, AB
T5J 0S1
Telephone: 429-5100
Fax: 429-5318

*Down to Business
Newspaper in Education*

Junior Achievement of Northern Alberta

(Alberta north of Lacombe, and NWT)
161, 10700 - 104 Avenue
Edmonton, AB
T5J 4S2
Telephone: 428-1421
Fax: 428-1031

Junior Achievement of Southern Alberta

(Lacombe and South)
739 – 10 Avenue SW
Calgary, AB
T2R 0B3
Telephone: 263-2545
Fax: 261-6988

Materials are available only where Junior Achievement has identified community business consultants and provided inservice.

Procter & Gamble Inc.

Educational Services
P.O. Box 355 Station "A"
Toronto, ON
M5W 1C5
Telephone: (416) 730-4711

*Canadian Consumers and Their Marketplace: 100
Activity Ideas*
Consumer Advertising
Consumer Choice

Royal Bank of Canada

Public Affairs
335 – 8 Avenue SW
Calgary, AB
T2P 2N5
Telephone: 292-3493
Fax: 292-3017

Your Business Matters [series]

Your Money Matters [series]

Rural Education and Development Association

14815 – 119 Avenue
Edmonton, AB
T5L 2N9
Telephone: 451-5959
Fax: 452-5385

List of speakers for schools.
Several modules on cooperatives and entrepreneurship.
Teacher resource package on cooperatives.

DISTRIBUTOR DIRECTORY

The entries in the Distributor Directory are arranged alphabetically by code.

Code	Distributor/Address	Telephone/Fax
ACC	ACCESS: The Education Station 3720 – 76 Avenue Edmonton , AB T6B 2N9	(403) 491-3213
CBA	Canadian Bankers Association 600, The Exchange Tower P.O. Box 348 2 First Canadian Place Toronto, ON M5X 1E1	(416) 362-6092 Fax: (416) 362-7705
ITF	International Tele-Film 301, 5090 Explorer Drive Mississauga, ON L4W 4T9	1-800-561-4300 Fax: (416) 629-1211
LRDC	Learning Resources Distributing Centre 12360 – 142 Street Edmonton , AB T5L 4X9	(403) 427-2767 Fax: 422-9750

ENTERPRISE AND INNOVATION

SECTION J: SAMPLE STUDENT LEARNING GUIDES

(INTERIM, 1996)

TABLE OF CONTENTS

A student learning guide presents information and direction to help students attain the expectations defined in a specified CTS module. It is designed to be used by students under the direction of a teacher.

The student learning guides included in this section are organized as follows:

- Why take this module?
- What do you need to know before you start?
- What will you know and be able to do when you finish?
- When should your work be done?
- How will your mark for this module be determined?
- Which resources may you use?
- Activities/Worksheets

A student learning guide is not a self-contained learning package (e.g., Distance Learning Module), such as you might receive from the Alberta Distance Learning Centre (ADLC) or Distance Learning Options South (DLOS).

SAMPLE STUDENT LEARNING GUIDES

Challenge and Opportunity (E&I101) J.1

Planning a Venture (E&I102).....J.9

Analyzing Ventures (E&I201).....J.17

Challenge and Opportunity (E&I101)

TAKE THIS MODULE?

- ☐ You will gain an appreciation for the field of entrepreneurship.
- ☐ You will discover many different ideas and opportunities as well as techniques to come up with these ideas.
- ☐ You will understand the importance of a well-developed plan and how to assess the plan.
- ☐ You will consider career options in entrepreneurship.

DO YOU NEED TO KNOW BEFORE YOU START?

- ☐ There are no module prerequisites.
- ☐ You must be able to offer ideas and suggestions and have a high degree of classroom participation.

Challenge and Opportunity (E&I101)

**WILL YOU KNOW AND
BE ABLE TO DO
WHEN YOU FINISH?**

- ☐ Apply strategies and develop competencies in:
 - identifying opportunities
 - creating and generating ideas
 - establishing needs, wants and priorities
 - assessing alternatives
 - assessing environmental impact.
- ☐ Identify, compare and assess a variety of venture opportunities.
- ☐ Describe the process and components of a venture plan.
- ☐ Investigate career options where enterprise and innovation are particularly important.
- ☐ Demonstrate basic competencies.

SHOULD YOUR WORK BE DONE?



Challenge and Opportunity (E&I101)**WILL YOUR MARK FOR THIS
MODULE BE DETERMINED?**

	PERCENTAGE
You must first demonstrate all of the competencies required for this module. When you have done this, your percentage mark for the module will be determined as follows.	
☐ Logbook Record consisting of a minimum of five entries that provide evidence of error in applying various strategies to generate and assess ideas individually and in a group.	30%
☐ Analysis of four entrepreneurial ventures using videos, magazine articles, books/newspaper.	20%
☐ Concept Test on the means of entering a business, components of a venture plan, business regulations and social responsibilities.	20%
☐ Written or Oral Presentation on interviewing an entrepreneur.	15%
☐ Personal Profile that illustrates your own entrepreneurial characteristics.	15%

RESOURCES MAY YOU USE?

- ☐ *The Entrepreneurial Spirit* (Liepner, DeJordy, Schultz).
- ☐ *Entrepreneurship: Creating a Venture* (Kretchman, Cranson, Jennings).
- ☐ *Entrepreneurship for Canadians - The Spirit of Adventure*. Video Series.
- ☐ *Creativity in Business: An Entrepreneurial Approach* (Loucks, Luczkiw).
- ☐ Community resources and entrepreneurs.
- ☐ Magazines resources in the classroom.

Challenge and Opportunity (E&I101)

A **Logbook** must be maintained as your tool for time management and organizational skills. Use the logbook to record your:

- schedule
- appointments
- performance
- activities.

It must be organized, up-to-date and submitted upon request. Insert the “Student Activity Profile” as page 1 in your logbook. This will help you keep track of assignments you have completed and handed in.

1. Form a group of four to six students. On the flipchart paper and felts provided, identify challenges and changes that Canada faces today. Rewrite the list of at least 10–15 challenges in your logbook.
2. In your same groups, take out your logbook. In your logbook, on the first blank page put the heading “What Bugs Me!”. On the second page put the heading “Needs”. On the third page, put the heading “Wants”. On the fourth page, put the heading “Problems”. Now, in any order, complete each page with at least 8 needs that you perceive you (or high school students) to have; 8 wants that you can determine; 8 problems that spring to mind; and 8 things that “bug you”. From this list, we will brainstorm as a class to see opportunities that may arise as a result. Instructors may want to expand this list as the module develops and the students gain an understanding of how to look at problems as opportunities. Students should make a note at the bottom of their last page to indicate how the group came up with their ideas. What strategies did they use? How did they determine who was group recorder? All this will help them in the future modules to determine leaders and followers.
3. As your instructor deems appropriate, we will venture into some creativity exercises that allow you to see things other than the way they really are. In your logbook, generate a list of possible uses for a single item. For example, given a simple brick, determine 20 possible uses for that brick. Students may wish to form groups or partners here to brainstorm and piggy-back ideas.
4. Create a poster/collage/bulletin board display that depicts a trend or fad that has the local, regional, national or international market in the past five years. Use classroom resources, magazines, newspapers and TV shows that are applicable, and any other medium you require to prepare your poster/collage or display.
5. View “Program #1: Catch the Spirit” from the series *Entrepreneurship for Canadians: The Spirit of Adventure* and use what they learned from the video to:
 - make a list of characteristics they think are common among, or important for, entrepreneurs
 - describe what they think entrepreneurs do and the contributions they can make to society
 - describe what they think are the important factors “motivating” entrepreneurs
 - summarize the contribution made by one of the entrepreneurs profiled in the video.
6. Generate a minimum of five ideas, alternatives and strategies to identify and determine viable opportunities within your community.

Challenge and Opportunity (E&I101)

7. View “Program #4: Ideas and Innovations” from the series *Entrepreneurship for Canadians: The Spirit of Adventure* and prepare a list entitled “Criteria for Assessing Ideas”.
8. Read *Entrepreneurship—Creating a Venture* section on “Roles and Thinking Skills in the Problem Solving Process” (pages 66–71). Complete the questions entitled “Your Turn” on pages 71–72. Put the answers in your logbook.
9. One method of idea generation is webbing. Start with a central theme or idea and web out extensions of the idea from there. In your logbooks, come up with at least 5 different ways for a person to:
 - water-ski
 - travel on vacation
 - take notes in class
 - do a report
 - walk a dog
 - go tobogganing.
10. As a class, discuss the sayings “There is nothing more dangerous than having an idea—when it is the only one you have” and “being married to an idea”. Discuss failure and its implications as an opportunity to learn.
11. Using chapters 11 and 12 of your text *The Entrepreneurial Spirit* or a business contact that you have made, determine the start-up requirements, risks, financial and personal sacrifice, skills required and words of advice that should be heeded when doing ONE of the following:
 - starting a new business from scratch
 - purchasing an existing business
 - purchasing a franchise
 - becoming involved in network marketing
 - planning a “fundraising” event.

You may choose to do this through an informal talk and prepare a written analysis, or through a formal interview, perhaps an audio/visual presentation would be a suggested format for interest and background on the company or business you are doing, or by organizing an entrepreneur/intrapreneur/volunteer to come in and talk with your class about the way he or she got into business ownership. Write your questions down in your logbook along with the responses you learned from your entrepreneur.

12. Using Yellow Pages, Chamber of Commerce Information, newspapers, Business Advisory Network Book, etc., determine at least 12 non-profit ventures that run in your community. When your list is complete, determine a definition of a non-profit organization and what their purpose is.
13. As a class, we will determine the process of creating a venture plan. This includes the question “What things do you need to consider before going ahead with a business idea?”
14. Now, brainstorm as a group/class as to the actual components that should be included in a venture plan. Ensure that you have each of the components written down in your notes. You should have a good understanding of EACH component of a business plan and what its contents should be.

Challenge and Opportunity (E&I101)

15. Pick ONE of the areas of the business plan and prepare a summary on what a business plan should include with regards to that area; e.g., if you are doing executive summary, you give a brief, overall view of what an executive summary is and what it should contain. Then, from a sample business venture, prepare that area of the business plan that you are expanding on. You will explain to the rest of the class, the section you picked, the overall view of the area and the sample of what it would actually contain if the business venture idea were to run.
16. From our venture plan and presentations, what limitations do we have upon us that may inhibit the success of the venture? We will discuss this as a class and write down our findings in our logbooks.
17. What criteria need to be considered to assess the feasibility of an opportunity/idea? That is, what will you do to see if an opportunity/idea you came up with actually has merit and a chance to succeed? Consider an opportunity for your student council to have a fund-raiser for the school to promote school spirit and a community awareness campaign. From this idea, prepare a feasibility analysis of the idea with such considerations as:
 - brief description
 - objectives of the idea
 - resources required to achieve objectives
 - time line required to implement the idea
 - limitations as outlined in activity #16.
18. Pick an entrepreneur within the community. See the resource, *Creativity in Business—An Entrepreneurial Approach*, for a sample guide with questions that you could ask an entrepreneur. Set up an interview time, determine the specific questions you would like to ask, conduct the interview, complete a good copy (if necessary), summarize what you have learned in paragraph format, and finally, send the entrepreneur a thank-you note for his or her time and assistance in helping you understand more about entrepreneurship. If your presentation is oral, set up a time with your instructor to share your information. If your format is written, ensure it is well presented and organized, preferably done on computer to edit and revise.
19. When someone is trying to determine what kind of business venture to become involved in, they have many options to research from: personal interviews, Internet access to information, meetings, conferences or seminars, trade publications, business books from library or bookstore, or magazine articles. Because of our limitations in time and access, our options to research business venture ideas are bound to a couple options. As one of your final assignments in this module, you must research and compare **four** different business ventures. Your research on each must cover the following components:
 - history/background of the entrepreneur
 - description of the venture
 - risks involved in the venture and how to minimize them
 - resources required to fund the venture
 - environmental impact of the venture (or other applicable impact)
 - conclusion—which of the four ventures has the most potential and justify.Resources you should be using for this assignment are publications, magazines (such as: *Fortune*, *Canadian Business*, *Small Business Opportunities*, *Entrepreneur*) and/or newspaper articles.
20. Complete the concept test for Module 101: Challenge and Opportunity.

Challenge and Opportunity (E&I101)**Student Activity Profile**

Module: _____

Student Name: _____

Date	SLG#	Description of Activity	Completion Date	Mark	Weighting
	1-3	Participation in Class			
	4	Trends Display/Poster/Collage			
	5	Video Program #1 and Reflective Questions			
	6	Opportunities in the Community			
	7	Video Program #4 and Criteria for Assessing Ideas			
	8	Problem-solving Process Questions, Kretchman Text, pp. 71-72			
	9/10	Summary/Idea Generation			
	11	Styles of Business Ownership			
	12	Non-profit Organizations in Community			
	13/14	Participation in Class			
	15/16	Business Plan Components and Limitations			
	17	Feasibility Analysis			
	18	Interview an Entrepreneur			
	19	Analysis/comparison of Four Business Ventures			
	20	Concept Test			

Planning A Venture (E&I102)

TAKE THIS MODULE?

- ☐ You will have the opportunity to learn and apply the “venture-planning process” while planning a venture.
- ☐ You will present your business plan to your instructor and a member of the business community for evaluation to determine what it is like to “think on your feet” and know your business inside out.

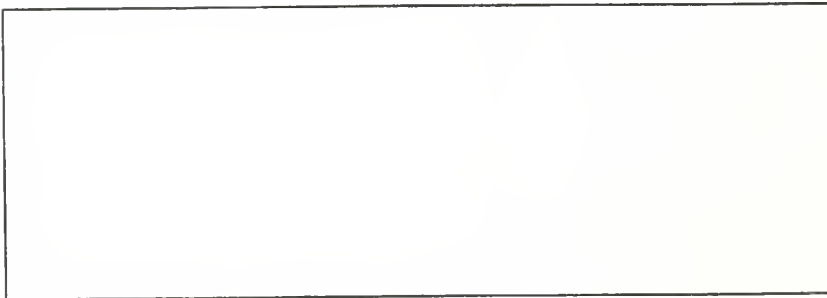
DO YOU NEED TO KNOW BEFORE YOU START?

- ☐ Prerequisite: *Challenge and Opportunity* (E&I101)

WILL YOU KNOW AND BE ABLE TO DO WHEN YOU FINISH?

- ☐ Demonstrate qualities that initiate change:
 - initiative
 - flexibility
 - leadership/teamwork
- ☐ Apply personal goal-setting and problem-solving strategies that facilitate change effectively
- ☐ Assess potential risks and propose strategies for assessing risks
- ☐ Develop strategies for securing resources and support to implement a venture
- ☐ Select, plan and assess a venture
- ☐ Demonstrate basic competencies.

SHOULD YOUR WORK BE DONE?



Planning A Venture (E&I102)

WILL YOUR MARK FOR THIS MODULE BE DETERMINED?

	PERCENTAGE
You must first demonstrate all of the competencies required for this module. When you have done this, your percentage mark for the module will be determined as follows: • Venture Plan: Consisting of research, technical and content components as outlined from your instructor. Your venture plan must assess potential risks and propose strategies for minimizing those risks. • Presentation of Venture Plan: A financial advisor from the Federal Business Development Bank will be coming in on a specified day for you to present your business plan. You will be graded on your presentation and knowledge of your business idea.	70% 30%

RESOURCES MAY YOU USE?

- ☐ Viable contact or mentor in the business community
- ☐ *The Entrepreneurial Spirit* (Liepner, DeJordy, Schultz)
- ☐ *Entrepreneurship - Spirit of Adventure*, Video program #2 and #5
- ☐ *Creativity in Business* (Loucks, Luczkiw)
- ☐ *Entrepreneurship for Canadians: The Spirit of Adventure*

Planning A Venture (E&I102)

1. Determine your venture idea. Write down its merits and the possibility of its success. Write down the risks associated with the idea.
2. Begin your research into support networks. In the field you are interested in pursuing, what person (or organization) will you need to speak to? You can ask that person who else you may need to know to help in your venture planning. You must keep a logbook of some sort on the person/business you are speaking with and the information you accumulated in each place. Begin your logbook now.
3. Now that the venture is gaining ground, formulate short- and long-term goals for it. Short-term goals are where the venture should be in 1 week, 2 weeks, etc. Long-term goals (for the purposes of this class) are where the venture should be in 3 months and what should you be focused on at that time. Write these goals at the front of your logbook.
4. Relate your own philosophy with the venture goals. At the bottom of the goal-setting page in your logbook, determine why you believe this venture can be a success given your strengths and weaknesses.
5. Determine what a mission statement is, and write one for your venture down on a page at the front of your logbook.
6. Read about planning a function (*Creativity in Business*) and determine areas you need to focus on to ensure your venture's success.
7. Read "Nintendo: The Planning Process in Action" (*Creativity in Business*). This reading should give you an idea of the kind of planning and marketing skills that are necessary for a venture plan to come together.
8. Outline a Human Resources Plan. What kinds of characteristics and skills do you need to make your venture a success? Each venture needs certain skills or characteristics of the people involved – each one should contribute a different area of expertise to ensure the success of the venture. Use the information out of Chapter 2, pages 18-33 out of *The Entrepreneurial Spirit* to help you here. Write down the names of the people involved in your venture. Outline what skills or characteristics each one brings to the venture.
9. As part of the planning process, you must determine the market that you will sell your product/service. Marketing is the process by which a product or service is moved from the producer to the consumer. No consumer is going to "beat down the path to your door" - you must have a carefully prepared and executed marketing process. Read the article "Introduction to Marketing" and the "4 Ps of Marketing" (*Creativity in Business*).
10. Do some market research to determine if there is a want or need for your product idea. Review any resources on marketing. **YOU MUST INCLUDE SOME CONCRETE DATA ON MARKET RESEARCH IN YOUR BUSINESS PLAN.**

Planning A Venture (E&I102)

11. In your logbook, outline your venture needs regarding:
 - target market
 - product/service
 - pricing
 - location
 - promotion ideas.
12. Keep your eyes and ears open for market changes. If you hear of anything you think MIGHT affect your market, write it down in your logbook. You need that information when the time comes for some of your promotion ideas. You might need to alter some of your original ideas.
13. Check with a mall administration ASAP and determine how to get your wares/products set up there. If the market you are trying to capture is the Christmas market, remember that other businesses begin sending in their applications at the end of September, early October. Book now!!!
14. Any business is risky. If the entrepreneur can examine the types of potential risks, he or she can then try to assess and propose strategies for dealing with them. For example, if a supplier says he or she will get the raw goods to you, the producer, at a certain cost by a certain day, what will you do if the shipment is delayed 3 to 4 weeks?

What is your backup plan? What if the cost goes up minimally or drastically? What will you do then? Read Chapter 6 in *The Entrepreneurial Spirit* and complete the following: Risking It! page 105; Entrepreneuring page 113; Developing your Entrepreneurial Skills page 117 #1,2,4.
15. Fill out the "Strategy for Risk Scenario" (*Entrepreneurship for Canadians: The Spirit of Adventure*) for your business venture in a format of your choosing (talk to instructor if you need guidance here). An entrepreneur takes calculated risks and prepares for possible changes. This is what you will be doing in this section. In your logbook, determine the risks that you perceive your venture may encounter as it develops. How will you minimize those risks?
16. You will really be focusing on trying to complete your business plan here. Most of what will go into your business plan, you have already done throughout this module. You now need to pull a lot of the information together in proper format. However, there are a couple areas that have not yet been addressed. First, you need to know a bit about the financial end of it. Determine all the costs you have for your raw materials from your suppliers (assuming you have already checked out a number of different suppliers). Write these costs down on one page in your logbook and add to them as you learn of new costs that you had not anticipated in the initial phases.
17. On a separate page, determine your sources of revenue (shareholders). If you do not have enough, then you and the members of your company must launch a shareholders campaign to try and raise more venture capital for your business. **YOU DO NOT NEED TO DEAL WITH RUNNING SHORT OF CAPITAL HALF-WAY THROUGH YOUR PRODUCTION PHASE!!!!**
18. Prepare a balance sheet for your business venture. Review a sample balance sheet as well as preparing a personal and an enterprise balance sheet.

Planning A Venture (E&I102)

19. Now you must do a projection of what you think your business will bring in, in the sales stages. To do this, you must have a fair idea of what an AVERAGE cost per item you are selling will cost your business to make. Use an Enterprise Cash Flow Projection, *Creativity in Business*, p. 392–392 changing from monthly to weekly sales projection. Once you know what it will cost per item to produce, you can determine how many units you are capable (financially) of producing and if you need to raise more capital, as well as what you think your product can sell for (comparison prices to other businesses selling the same or similar products are needed here) and the profit expected from the sales of your goods.
20. From here, you are able to complete and type up (on computer and running a spell check) your business plan. You will be notified of the day you are to present your business plan to the instructor and member(s) of the business community for evaluation. **YOU MUST BE READY TO PRESENT ON THE DAY SPECIFIED AS THAT IS THE ONLY DAY THE COMMUNITY RESOURCE PERSON WILL BE COMING IN.**
 - **Present your business plan.** Ensure you are prepared and know all the components of your business plan before you come to your interview that day. You should have made a copy for myself and the financial advisor, as well as a copy for EACH member of your business.
 - OR
 - **Complete alternative assignment:** Activities #25-31.
21. Prepare in your logbook the next few days of the things you will need to accomplish in your business planning stages. Perhaps you need to raise more capital, determine advertising needs, come up with sales options, sales contracts or an order form for customers, open up a bank account for your business, begin your formal accounting records, talk with some of your contacts and determine methods of sales and advertising that would best suit your needs, etc. You must stay focused on the needs of your venture as well as timeline of product for production and marketing phases. When you are ready to set up your business' chequing account, contact your instructor. There are to be two signatures on each cheque: your instructors will be one and the treasurer of your business will be the second.
22. If necessary, order the materials you are going to need to produce your product or provide your service. Keep in mind, you must have enough capital to cover the cost of your order. Your supplier will likely want your money in the bank account BEFORE the goods are sent. It may take up to 10 working days for your cheque to clear the bank and the supplier to know your cheque won't bounce. Ensure that you check out different suppliers and get the best price you can. You should look for wholesalers to supply you with raw materials for your business venture.
23. Do you need to contact a radio station or a newspaper? Usually there is 2-week waiting period before a non-profit group can get its ad put in for upcoming events/sales. You should begin to get your timeline finalized to ensure you have communicated as best you can to the public information about your product or service and when it is available.
24. Finally, fill in some of the questionnaires (handout) that allow you to assess your own entrepreneurial skills and abilities to determine if entrepreneurship is really for you. Answer the questions honestly and usually with your first reaction to the statement or question - if you have to think about it too long, you probably do not possess the skill or trait.

Planning A Venture (E&I102)

Alternative assignment to be completed ONLY if you DID NOT present your business plan:

25. In your logbook, determine **three** personal goals of your own that address:
 - your evaluation of the course, Enterprise and Innovation and justify your evaluation
 - what you hope to obtain from a course such as Enterprise and Innovation.
26. After filling out the questionnaires on skills and characteristics of entrepreneurs, determine what three careers where entrepreneurial skills are particularly important.
27. Interview an entrepreneur in your community and focus on the kinds of goals the entrepreneur must set and what kinds of skills/characteristics he or she had before entering the business that he or she is in and what skills/characteristics he or she had to acquire or learn to succeed in business.
28. Part of the entrepreneurial spirit is an understanding of community needs. Entrepreneurs give their time, not only to their own business ventures, but to other projects or events in their community as well. You must provide a minimum of two hours volunteer work with a community member/organization. If you cannot find one, contact your instructor, and one will be set up for you to help with, even within the school, such as a drama production, an athletic event, or some other event that the school is responsible for organizing.
29. Choose a magazine from the resources in the classroom, or the library. It must be a business publication that gives an understanding of different business venture. Prepare a summary on the article pertaining to entrepreneurship. You must include: five main points and a summary of each; a statement of the author's point of view, your own personal perspective on the article, and be technically pleasing and in format – a title page, headings, page numbered, etc.
30. Your venture is currently underway. Your group has gone through the stages of planning, in detail, the entire business venture. In your logbook, write down, exactly what you have contributed to the venture so far. Once that is done, determine how you could improve on future contributions to the venture. This may help you “set goals” and try and accomplish more as you develop your venture.
31. You are the head of a multinational corporation. You have determined that your departments are not working together in optimum condition. You want to have a staff retreat (where all departments leave work in the morning and meet in a completely different environment – like a lodge or cabin in the mountains). You take your departments to Kananaskis to work on team-building to try and get them to work together in a more productive fashion. You have to, however, come up with a team-building exercise that allows them to discuss options, brainstorm, work together and come up with a plan. You want to make it fun, though and not work-related. Determine what your team building exercise will be, how it should be implemented and how you will evaluate whether or not your employees obtained any value from this exercise. Ask your instructor for an example if you are unsure how to get started on this one.

Analyzing Ventures (E&I201)

TAKE THIS MODULE?

- ☐ This module will allow you to analyze data to make informed decisions on the feasibility of ventures.
- ☐ It will allow you to take a critical look at the various components of a venture and how to improve its chances of success.

DO YOU NEED TO KNOW BEFORE YOU START?

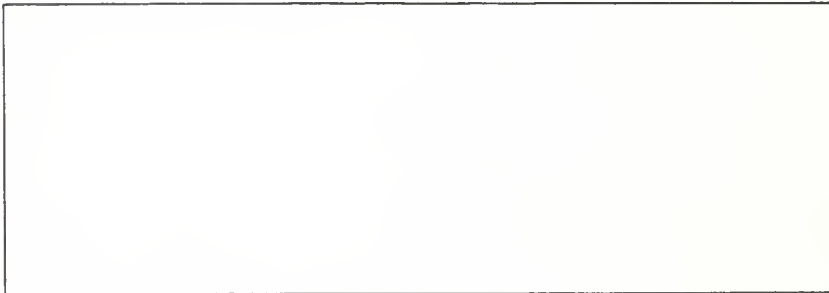
- ☐ Prerequisite: *Challenge and Opportunity* (E&I101)
Planning a Venture (E&I102).
- ☐ It is recommended, although not a prerequisite, that you have completed or are currently completing *Making It Happen* (E&I204).

Analyzing Ventures (E&I201)

**WILL YOU KNOW AND
BE ABLE TO DO
WHEN YOU FINISH?**

- ☐ Describe and apply various methodologies for analyzing and evaluating ventures:
 - market analysis
 - industry analysis
 - financial analysis
 - product/service evaluation.
- ☐ Analyze the research, compare a variety of ventures and make informed decisions about the feasibility of each venture.
- ☐ Demonstrate basic competencies.

SHOULD YOUR WORK BE DONE?



Analyzing Ventures (E&I201)

WILL YOUR MARK FOR THIS MODULE BE DETERMINED?

	PERCENTAGE
You must first demonstrate all of the competencies required for this module.	
When you have done this, your percentage mark for the module will be determined as follows:	
• Research Project consisting of: – primary and secondary research – analysis of this data.	70%
• Comparison of two ventures using a minimum of five criteria.	30%

RESOURCES MAY YOU USE?

- ☐ Contacts in the community
- ☐ *The Entrepreneurial Spirit* (Liepner, DeJordy, Schultz)

1. What criteria are to be considered when examining the success of a venture? Brainstorm with your company members, use *The Entrepreneurial Spirit* (Chapter 8) and perhaps even your business mentors to determine at least 10 criteria. Your instructor will add and modify your list to include all necessary criteria. Write your 10 criteria down in your logbook.
2. Market research is a very labour-intensive undertaking. It is also a vital component to the success of a business venture. The resource centre has reference material which provide valuable information on this topic. It is recommended that you do PRACTICAL market research that will benefit your venture, or one of your business mentor's products/services.
For either YOUR business or volunteer venture, or for one of your business mentors products, prepare a sample questionnaire/survey that will allow you to determine the success of a particular product/service or the market need for a product/service. Ensure the sample questionnaire is checked over by the instructor and the business mentor.

Analyzing Ventures (E&I201)

3. Conduct a survey (primary research) that gives a good cross-section of the market (this may be determined by the business mentor, or, if you are conducting research on your own venture, by the instructor). You must interview a minimum of 75 people. When you are done, summarize the results of the survey and prepare a written evaluation (paragraph form) that analyzes the findings. You must do an analysis of this data using the following methodologies:

- market analysis (what does the market want?)
- industry analysis (what does the industry want?)
- financial analysis (what are the financial gains?)
- human resources analysis (what kinds of people are required?)
- product/service evaluation (does the product or service meet the expectations of the consumer?)

In your logbook, after this written evaluation, determine two advantages and two disadvantages encountered, with regards to primary research such as surveys/questionnaires.

4. Determine two other methods of primary research and any perceived advantages and disadvantages (*The Entrepreneurial Spirit*, Chapter 13 may be of benefit to you).
5. Along with primary research, there is also secondary research. Determine any three sources of secondary research, and the advantages and disadvantages of secondary research.
6. Using CURRENT local statistics available, determine a trend in the local demographics. This could be in population, in age, in birth rate, death rate, income levels, education levels, spending habits, etc. pick ONE trend and prepare a chart/graph (pie chart, line graph, bar graph, etc.) that depicts the trend.
7.
 - a. In your logbook, determine what information can be extracted from charts and data such as what you have just completed.
 - b. From this analysis, what then can be determined by researching statistics available through various sources?
 - c. How do such statistics benefit entrepreneurs?
7. Read any two case studies from magazine resources and complete a comparison on the ventures in terms of the following:
 - your personal criteria for success
 - human resources
 - production
 - management
 - marketing
 - distribution of product
 - technical feasibility
 - general acceptance
 - competition
 - legalities
 - risks (financial, personal, legal, societal, environmental)

Analyzing Ventures (E&I201)

Since you know the criteria for comparison, you may wish to choose your case studies carefully. If reading case studies does not interest you, then you may prefer to make a comparison on two local businesses using the same criteria. This does require more legwork and time on your part, however, it would certainly be relevant beneficial to you.

9. Now, focus in on your particular venture. You will prepare a written critique, including an in-depth analysis and assessment of the business or volunteer venture by using the data presented (such as the market analysis). Assess the strengths and weaknesses of the venture, as well as re-evaluate the risks associated with it. Determine the viability of the venture with considering resource and time constraints, as well as the previously collected data such as market analysis, cost factors, and any other relevant data.

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